RON CARSON

Quotes from the 2013 Excell Conference panel on feedback from 7 young professionals and 7 near retirees or retirees on advisor best practices.

"I want my advisor to tell me two things at every annual review: How did my investments do, and how much did it cost me?"

"My advisor should help me meet my goals, not try to beat the market every year."

"I don't need a one man expert, I need an advisor who can connect me with experts when I need them."

4 CORNERSTONES

- CLIENT ACQUISITION
- CLIENT RETENTION
- CLIENT EXPERIENCE
- ADVISOR PRODUCTIVITY