



## “Mayflower Advisors, LLC” Video Transcript

[Music]

We're in an evolving industry and this industry is changing very rapidly and a team approach is really the best way to service those needs. But also an independent platform allows us to be very nimble, very quick to invest in the areas where we see growth.

We definitely try to encourage and foster a very collaborative culture here. We have a very diverse skill set with people that work in non-for profit space that work in the for-profit corporate environment. A variety of younger and older advisors working with high net worth individuals. Everyone brings something a little unique and different. And at least a different view point to the table.

From the beginning we always sought out to build a team. Steve, my partner, has tremendous expertise in the corporate retirement plan space. And that's been great servicing many of my clients. Who I work with as individuals and on planning phases. Likewise, I'm able to work with many of his corporate clients.

We have a Monday morning meeting every single week, where we just throw ideas out. Everyone idea shares about what's working for them. We want to see that continue. And it gets tougher and tougher the larger we get, but so far we've been very fortunate and our culture has really flourished here.

You know we never wanted to grow for the sake of growth. We didn't want to be the biggest restaurant in town. But we wanted to have the best food. And for us that meant having the best expertise, the best service and the best resources for the benefit of our clients.

Independence is highly valuable. Most corporations really are looking for an independent thought leadership. Not someone that's simply regurgitating what a New York home office wants them to say.

For us the most important asset, is really our people. They're the ones on the front lines. They're the ones talking to the clients. They're the ones servicing their needs. And after all, we're in a service business. So we want to make sure it's a culture where they like coming to work.

We've received a lot of national recognition. We were named Retirement Plan Advisor of the Year, by PLANSPONSOR Magazine. Pro Bono Advisor of the Year by Financial Planning Magazine. I was president of the National Association Plan Advisors. We've been recognized by the governor in the state for helping to advocate for financial literacy.

I've been involved in the Massachusetts Jump Start Coalition for Personal Financial Literacy, where we're teaching teachers, we're teaching schools, working directly with students. We found it incredibly rewarding. Helping families identify what's important to them. Helping them transfer their values to their children. Helping them have better discussions at the dinner table.

A lot of other advisors from other firms have been attracted to the model they we've built. It's independence, but it's independence with resources. And it's worked quite well for us.

We're really proud of what we've been able to build. And we really enjoy coming to work every day. We still have the fire in our belly and we want to share that with all of our employees and all of our clients.

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