

“I Wish I Would Have Done It Sooner” Video Transcript

[Music]

Choosing INDEPENDENCE with FiNet

Kelley Tate (Venice, Florida): We liked the idea of owning our practice and owning our own business, and having more control over our relationship with our clients.

Jim Tate (Venice, Florida): They offered us the opportunity to be independent and to run our business as a small-town boutique-type business with a big financial backer behind us.

Brandon Blair (Salem, Oregon): It’s a group of people that they call FiNet that truly care about the client first, and any company that’s willing to put the client first, we’d like to be a part of.

What was the TRANSITION like?

David Kassir (Falls Church, Virginia): There was a system in place to make this transition as smooth as can be.

Dick Greco (Irvine, California): I thought it was very easy. I had a lot of support. It was probably one of the easiest things I’ve done as an independent and starting a company. The relationship with your clients doesn’t change, the brand is excellent, so I never had any issues with moving clients. What type of SUPPORT is available?

Janet Redman (Lewes, Delaware): I felt very supported with Wells Fargo. I do a lot of the long-range planning for our clients, so I found that any question I had was very easy to get an answer to.

Randy McAlpine (Lincoln, Nebraska): FiNet treats us that they’re lucky to have us. They’d bend over backward to support us.

The FiNet Culture

Kelley Tate: Well I think the culture of FiNet fits perfectly with us because we’re very client-centered and relationship-centered, and I think that being in FiNet, we have that feeling—we feel like we’re part of a family.

Mic McConkey (Lincoln, Nebraska): I would say it’s a community. They’re interested in us as the professionals and they’re very interested in helping our clients.

Tim Adams (Yardley, Pennsylvania): FiNet offered us really the opportunity to take control of our business lives—to really gain the control in independence.



FINANCIAL NETWORK

Chris Inman (Hattiesburg, Mississippi): The culture at FiNet is exactly what they say it is: Simplifying Independence. They have everything from helping me with the transition to coaching. They truly have simplified the whole process for me, and making it more simple than I ever thought it would be.

Janet Redman: Why would we go anyplace else?

Unidentified Advisor #1: And you look back and you say, "I should've done this a long time ago."

Jim Tate: I wish I would have done it sooner.

Unidentified Advisor #2: I wish I would have done it sooner.

Kelley Tate: I wish we would have done it sooner.

Unidentified Advisor #3: I wish I would have done this sooner.

Mic McConkey: I would have done it much sooner.

Find out how Wells Fargo Advisors Financial Network Simplified Independence – www.wfafinet.com

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0216-05112