



Participant comments from Jeff Mowatt's
Becoming a Trusted Advisor
seminar held September 14, 2017

"Jeff did a great job involving our team and doing his homework. By using these tools Western Financial Group will continue to be a leader in our industry."

Andrew Cilinsky, Director Financial Services, Regional Director Western Financial Grp

"Awesome presentation, very engaging. I'm going to share everything with my staff as the whole presentation was super informative."

Greg Punt, Branch Manager, Coast Capital Insurance

"This will enable us to create that differentiation that we are looking for."

James Hall, Regional Vice President Kootenays, Western Financial Group

"Awesome presentation. This will increase retention and referrals for new business. 'Giving value to clients' gives value to us."

Gail Smook, Branch Manager, Vegreville Western Financial Group

"This was an amazing seminar! This will shift our value, clients will see us as their 'Trusted Advisor.'"

Vicki Penney, Branch Manager, Western Financial Group Saskatchewan

"I would love a follow up seminar. I can't wait to help my staff grow through changing their words."

Kristy Stadlwisser, Branch Manager Turner Valley, Western Financial Group

"This was perfect! I will take this back to my team and encourage some positive changes."

Kelly Ritchie, Claims Manager Victoria, Insurance Service Centre

"This was awesome! I will improve our staffs' perceptions, help increase engagement and sales."

Susan Bishop, Branch Manager Calgary, Western Financial Group