00:00:05:00 - 00:00:27:10

So my name is Julie Seberras and I'm the head of wealth planning and practice management here at Manulife Wealth. My team provides expertise to advisors each and every day through wealth planning, where we help advisors with complex scenarios and building plans for their clients, and then, as well as on the practice management side, where we help advisors grow their practice and help them become the entrepreneurs that they are.

00:00:27:15 - 00:00:49:07

The type of advisor that's going to thrive at Manulife Wealth is going to be an entrepreneurial advisor who is looking to grow their practice, as well as eventually transition their practice to another advisor within Manulife Wealth. Our advisors are able to put their brand front and center alongside the Manulife Wealth brand, showing the strength of the partnership, and they're able to show this in the communities that they serve.

00:00:49:08 - 00:01:21:00

Our advisors have access to our Wealth Planning Services team, who can provide support and expertise around building financial plans. In addition, we have a partnership with Conquest, allowing our advisors to access financial planning software so they can conduct analysis and provide strategies and recommendations to their clients. Our advisors can also enhance their planning conversations through our partnership with Life Map, who really gets into the qualitative side of financial planning, enabling better conversations, which leads to better quantitative analysis for our clients.

00:01:21:00 - 00:01:52:08

And then the advisors can implement some of those recommendations through our partnerships with ClearEstate, Willful and Fiduciary Trust. One of the greatest benefits of our firm is that our advisors are independent. They're able to work with the right partners, platforms, and programs that work best for them in their practice as well as their clients. Our product shelf is open architecture, so advisors can really choose the right partner for them to help them grow their business and provide the right solutions for their clients.

00:01:52:10 - 00:02:14:17

So Manulife has invested heavily in transforming our tech stack, and the tools and resources that we have available to advisors is really going to be that entrepreneurial advisor that is looking for support in building their business, but also looking for an environment that allows them to operate independently and run their practice in a way that makes sense for them and makes sense for their clients.

00:02:14:18 - 00:02:23:14

Advice is so important. Clients all have the same question, which is, am I going to be okay? And advisors are able to answer that important question for them.