

1

00:00:04,750 --> 00:00:05,875

I'm William Frenn,

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00:00:05,875 --> 00:00:09,166

portfolio manager and senior investment
advisor at Manulife Wealth.

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00:00:09,166 --> 00:00:12,375

I'm a partner as well
in the Diligence Wealth Management group.

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00:00:12,416 --> 00:00:16,250

My initial career path wasn't
directly in the wealth management space.

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00:00:16,250 --> 00:00:18,791

I've always been passionate
about the financial markets.

6

00:00:18,791 --> 00:00:22,083

I've always been, you know, passionate
about wealth creation.

7

00:00:22,083 --> 00:00:25,250

But my first career
was actually in engineering.

8

00:00:25,833 --> 00:00:27,000

I have always been an entrepreneur.

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00:00:27,000 --> 00:00:29,000

I always liked the space of being independent.

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00:00:29,000 --> 00:00:34,291

I've always been passionate about the
financial markets, about building wealth.

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00:00:34,541 --> 00:00:35,875

Manulife is a great partner.

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00:00:35,875 --> 00:00:39,708

On one end, you get to partner with a firm
that has a history that spans

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00:00:39,833 --> 00:00:44,416

as long as the country itself, and whilst
giving you the independence

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00:00:44,416 --> 00:00:47,958

to be able to advise clients
without any complex of interest.

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00:00:48,000 --> 00:00:52,791

So Manulife provides that independence
to be able to service our clients

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00:00:52,791 --> 00:00:53,750

without any conflicts,

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00:00:53,750 --> 00:00:57,000

without the pressures that can come
from a corporate environment,

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00:00:57,000 --> 00:00:59,000

while at the same time
offering the security

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00:00:59,000 --> 00:01:02,291

and the partnership of a brand
that's recognized nationwide.

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00:01:02,833 --> 00:01:05,375

If you serviced your clients
with independence

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00:01:05,375 --> 00:01:09,625

and putting their interests first,
that allows you to retain their business,

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00:01:09,666 --> 00:01:11,125
most importantly, retain their loyalty,

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00:01:11,125 --> 00:01:14,958
but also get referrals, get
and be able to put your best foot forward.

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00:01:14,958 --> 00:01:15,500
Always.

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00:01:15,500 --> 00:01:19,541
And the Manulife brand provides
the security

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00:01:19,583 --> 00:01:22,833
for the planet peace of mind,
especially for a new relationships.

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00:01:22,875 --> 00:01:27,458
What's nice about the Manulife leadership is
you can sense that they they care.

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00:01:27,500 --> 00:01:31,958
There's multiple councils
that are set together to listen to advisor

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00:01:31,958 --> 00:01:36,500
and listen to what's on the ground
so that they can make improvements.

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00:01:36,500 --> 00:01:41,625
So you know that there is a there's always
someone to speak to, to voice out

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00:01:43,250 --> 00:01:45,916
whether
it's frustrations or improvements, ideas,

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00:01:45,916 --> 00:01:48,916

so that we're able to move forward
together as an organization.

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00:01:49,416 --> 00:01:52,125

It's always humbling
when a client speaks to you about,

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00:01:52,125 --> 00:01:54,000

you know, naming, asking if they can name

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00:01:54,000 --> 00:01:57,000

you as their executor for their will
because they trust you this much.

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00:01:57,791 --> 00:02:00,625

Clients that are,

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00:02:00,625 --> 00:02:03,041

you know,
happy to be able to pull the switch

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00:02:03,041 --> 00:02:06,000

and finally retire
with the confidence that they will be okay

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00:02:06,000 --> 00:02:09,750

because they've been building on that plan
for the many for many years before.

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00:02:09,750 --> 00:02:14,291

So getting those thank yous from clients,
getting those referrals or clients

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00:02:14,291 --> 00:02:19,166

that speak well of us even when we're not,
we're not around and we find out through

42

00:02:19,166 --> 00:02:23,125

somebody who just met us, this recognition
or this humbling gratitude

43

00:02:23,125 --> 00:02:25,291

that comes from these relationships
that we build.

44

00:02:25,291 --> 00:02:27,833

It starts off
with a financial conversation.