CLIENT APPRECIATION SPEECH

FOR

CHUCK ROWAN

Hello everyone and thank you all for joining us at this wonderful dinner. So much has happened in the past twenty years to all of us, the economy, and how we live our lives. We all understand so much more than we did back then, or if we don’t, at least we have the foresight to seek guidance from “the professionals.” We’ve learned that education is essential in any branch of financial planning and we’ve also learned that nothing lasts forever-not the outrageously good or the “more challenging times.” I am certain that without the loyal support and votes of confidence received from all of you, I would not be standing here tonight. Twenty years ago, we were younger, thought we were wiser, and were primed to learn the lessons of our lives. Back then, some of our contemporaries thought they “knew everything.” Now, as a friend says, “I don’t know what I don’t know!” Nothing like a little perspective! Back in the early 90’s, we all stood on the precipice of possibility. To try and give you a little perspective on what life was like back then, I looked up some numbers. In 1992, a postage stamp was 29 cents. The average price for a gallon of gas was $1.20-**OUCH!!** and someone buying a house back then would pay a median price of around $125,000 give or take a few. I began my business as a mortgage broker back then…Well, Well, Well!! How we’ve grown! As many of you know, we now offer a wide range of products such as \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ that can be adapted to suit your individual requirements.

Several of you who are here tonight have known me almost since those very early days and every day I am thankful for the faith you’ve demonstrated in my ability to serve your financial needs. Thanks to your referrals and positive feedback to your colleagues, families and friends, (**name of your company**) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ has grown into a comprehensive one-stop shop where a client can come in, speak to someone, and rest assured that my team and I will serve you, support your financial visions and do what we can to balance the euphoria and the sting inspired by the roller coaster we know as personal financial participation.

Warren Buffet once said, “Someone is sitting in the shade today because someone planted a tree a long time ago.” That’s a nice way of looking at what we do. We are all planting seeds with the intention that they bear fruit and shade when we need it. Back in the early 90’s, some of us were fairly naïve. Those of us who are smart-and to me that includes each one of you, had a plan, even if it was a small one, and nurtured it, and watched that plan grow. Of course there were “lessons to be learned” along the way, and we may not have been strapped in tight enough when the financial roller coaster hit some of those bigger bumps, but you did your best to stick with the plan and adapt your portfolios to the demands and trends of the times.

I am also very thankful that whenever I ventured into new financial territory, many of you took a chance and shared the ride with me. That’s a huge acknowledgement for me and I appreciate your demonstration of confidence more than you know, after all, we started with mortgages and then offered products and services to create a broader synergy within the business. Although 20 years have passed, I am still thrilled when I see the look of satisfaction on a client’s face. It has always been a privilege to work with each one of you in whatever capacity was required, and to know that I have assisted you in creating a greater feeling of security for you and your families is, well, priceless.

Someone once wisely coined the phrase, “Adapt or die.” I’m really very happy to see that all of you have made the right choice! Informed choices and adaptability are the keys to success in this rapidly changing world. I am proud to say that \_\_\_\_\_\_\_\_\_\_\_\_\_ (**name of your business**) has been a viable and organic entity in the lives of so many people in our community. As you learn to sustain yourselves, we in turn become more adept at guiding our clients and It is because of people like you, that others are making more informed choices when it comes to determining their financial futures.

Our clients are our priority and we are always looking for the next great direction to explore in order to develop and offer products and services tailored to the needs of the investor in today’s evolving marketplace. It is with that in mind that I am very excited to introduce our guest speaker, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, who is here tonight to announce some exciting and unique new developments. Before \_\_\_\_\_\_\_\_\_\_\_ steps up here, I want to thank all of you again for your enthusiasm, confidence, and willingness to take this ride with me. Here’s to many years of success, knowledge and satisfaction for each one of you, and remember the words of Thomas Alva Edison, who said, “Good fortune is what happens when opportunity meets with planning.” I look forward to exploring and planning new and exciting opportunities with each one of you!!

Thank you all!