

## Thoughts on a Financial Services Career

### ***“Setting Your Products, Services, and Yourself Apart From the Competition”***

**By: Nancy Ogilvie  
Guardian Financial Representative , New York City, NY**



#### **Invent Your Brand Once: Refresh It Often**

The points of differentiation between you and your competition and how you—the marketer of your products and services—communicate those differences is what defines your brand. Nancy asserts that by establishing an arsenal of proven branding “staples”, i.e., your own company name and logo, consistent company colors, formats and fonts, along with a descriptive company slogan, you can create an image of “...not just what you sell, but of who you are.”

She adds, “A brand is always evolving,” and references Coca-Cola to illustrate that since the product’s inception, original branding staples—like the color and style of the Coca-Cola logo—have remained the same. Every few years, however, Coke has had to refresh its sales message and expand its product line to meet shifts in consumer demand and competitive activity. “As you grow and develop, your brand should grow and develop with you.”

#### **Pictures Can Paint a Thousand Words**

Nancy also suggests using analogies to help clients “visualize” how you and your business operate. For example, she created *Think 4 Prosperity* not as a product, but as a unique process her clients could adopt to realize their financial goals.

Her offices are housed inside New York’s Guardian building. And although she is not an employee of Guardian, Nancy fully represents their product as a Financial Representative. To help clients understand how she operates, Nancy tells them to think of the Securities building as a “hospital.” Inside the hospital, “groups of doctors” (advisors) assist their “patients” (clients) in a specific area of expertise.

Nancy lets clients know that having a relationship with think4prosperity is like having a personal doctor in their charge—an expert who either alone, or with the collective counsel of other trained specialists, can skillfully lead them to optimal (financial) health.

#### **Deliver an Experience**

According to Nancy, giving your clients a unique experience will create substantial value. The key, she says, is to make your clients feel like they’re getting something special from you; something no other financial professional could offer.

“Think about the way Starbucks does business,” she suggests. “When people go to their local Starbucks, they’re greeted, sometimes by name and enveloped in the busy, familiar buzz of a fun, comfortable environment. Starbucks patrons aren’t just buying into the coffee, they’re buying into the Starbucks experience.”

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