

Financial Benefits are People Benefits video script

April Halloran: When my children ask me what I do for a living, I tell them I help people save so that someday they can spend time with their grandchildren. I teach people how to do that.

Lisa Margeson: Our responsibility is to help individuals understand their full financial lives. Not just saving for retirement.

Steve Ulian: To help that person truly achieve their financial goals that in turn leads to them being able to fulfill their dreams and their ambitions.

Lorna Sabbia: The magic here is understanding what our clients are going through, what their fears are, what gets them excited.

John Quinn: Acting in the best interests of our clients is critically important as we help them achieve their goals.

Danovan Clacken: We build that trust with our clients through constant communication.

John Quinn: The insights that we provide are critical for our clients. The more that we can deliver personalized advice, the more than we can understand the goals of a unique individual, or a company, helping companies truly take benefits to the next level.

Chris Adam: Our clients have the power to make decisions that are well informed.

Lisa Margeson: Our employer clients have the power to really make a difference, an impactful, positive difference in the lives of the employees that work for them.

Steve Ulian: Our companies that we do business with really do have the power, in my mind, to change the world.

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