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Our Latest News



Charlie Schwartz, MBA, AAMS®, CRPC®
Senior Vice President | Senior Manager | Branch Development
St. Louis, MO 63105
T 314-480-3628
Email

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TRUST **INTEGRITY** **MUTUAL RESPECT**

A Message From Charlie

Let me start by congratulating Lois Powell on her retirement. Lois was Edwards' Director of Branch Development after a standout career as an advisor, manager, regional manager and Director of Branch Development. She has been instrumental in the growth of the firm. We wish her the very best in retirement and appreciate her contribution to our success.

I am fortunate to have been selected to step into Lois' shoes, so to speak, and take the reins in Branch Development at Edwards. I have come full circle, having started my career at A.G. Edwards and now find myself home again. I look forward to meeting you and talking about my journey and why Edwards is the right place for me.

One of the things that makes this the right place for me is that we ask for input from our advisors, and we act on it. In addition to our Financial



Aimee Shouse
Vice President – Investments
Jonesboro, AR
T 870-520-7000
TF 844-331-6421
Email

The Best Move Ever

Compensation plan changes, pushing bank products, encouraging clients to take on debt through lines of credit and mortgages. This atmosphere was the impetus for me to make a move.

At my old firm, the comp plan changed every year. Every quarter, I had to reach the set threshold of having X number of referrals, mortgages, credit card, bank accounts, and trust accounts. If any one of the boxes was not checked, my comp changed. I was penalized. They paid advisors on the asset and liability side. I found it counterintuitive to guide my clients towards borrowing funds when it did not make sense for their situation.

I had enough. What my former firm was doing seemed to be the opposite of what most people need to do to be financially secure: avoid debt and build wealth. So, I decided to make the move to Edwards, and I am so happy I did. I started my career at A.G. Edwards, so this was like coming home. The support I receive in our office and the home office is unbelievable. When I call the home office at Edwards, I can call people directly and they'll answer the phone and say "Hi Amiee, how are you doing today? How can I help you?" At my previous firm, I would be on hold for 30 to 40 minutes and would have to recite my employee number before I could get someone to talk to me.

I was worried about changing firms. Would it be difficult for my clients? Would I adapt to the new technology? Will I be able to learn a new system and platform? Edwards sent a transition specialist to my office. She helped

Associate Advisory Board, and our Regional Advisor Panel, we recently formed a Female Advisor Networking Event to offer our female advisors the opportunity to share experiences they encounter as well as share ideas in balancing the needs of their clients with their life demands.

I also want to carry on the tradition of sharing news about our developments and the personal stories of advisors who joined Edwards. This month we focus on Aimee Shouse.

Charlie

me transfer accounts and learn the system. She worked with me side-by-side answering questions and helping me with clients. We were a great team!

The technology here is so much more intuitive than where I was. If you can operate a cell phone, you can use the technology here. On top of that, the other advisors in my office have been so supportive and kind. I work with a great group of people. Between Lisa on the transition team, the advisors in my office, and the home office responsiveness, it was easier than I expected or hoped.

I've found that people genuinely like it here! Clients tell me that I must be sleeping better because I look happier! At my prior firm, my clients and I had to get through two locked doors to go back to my office. My clients feel welcome here. I used to get the Sunday night blues but no more. My husband can testify that I am back to myself. On top of all that, the comp plan hasn't changed since they opened the doors and it's easy to understand.

It's been the best move ever. I am happier, my clients are happier, and my husband is happier. I wish I would have done it sooner.

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For More Information, Contact:

Charlie Schwartz, MBA, AAMS®, CRPC®
Senior Vice President | Senior Manager | Branch Development
314-480-3628
charlie.schwartz@benjaminfedwards.com

Chuck VanGronigen
Senior Vice President and Manager | Strategy & Administration
314-413-6927
chuck.vangronigen@benjaminfedwards.com

Josh Hayes, CFP®
Vice President | Branch Development
314-480-3224
joshua.hayes@benjaminfedwards.com

Sandy Maloney
Associate Vice President | Branch Development Coordinator
314-326-4481
sandy.maloney@benjaminfedwards.com

Matt Waltrop
Vice President | Branch Development
410-236-4879
matt.waltrop@benjaminfedwards.com

Alana Seamon
Associate Vice President | Branch Development Coordinator
203-616-2122
alana.seamon@benjaminfedwards.com

Maggie Shank
Associate Vice President | Branch Development Specialist
314-480-1128
maggie.shank@benjaminfedwards.com

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