



# CASE STUDY

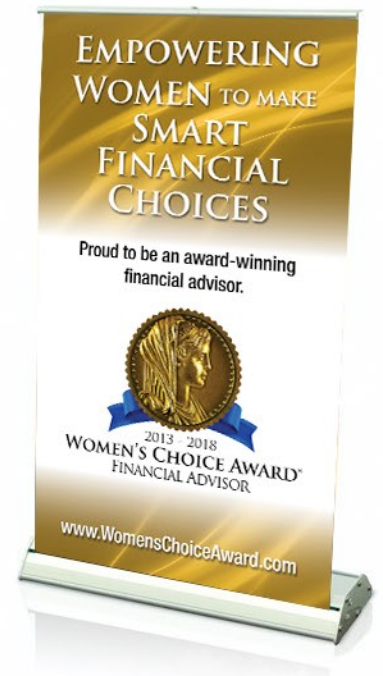


## SITUATION

Choosing a financial advisor you can trust can be a very difficult task, many don't know where to start, where to look, or the different types of financial advisors available. Differentiating yourself from the crowd can be difficult, especially when over a third of Americans don't have a good understanding of what a financial advisor actually does.<sup>1</sup>

## SOLUTION

Earning a recognition like the Women's Choice Award, which is trusted by women throughout the country can be the competitive advantage you are looking for. Women trust the Women's Choice Award seal, as Debra Taylor learned firsthand. "My name is Debra Taylor, and I am the principal and founder of Taylor Financial Group. I am a five-time winner of the Women's Choice Award for Financial Advisors. As a female financial advisor, my main goal is to provide women with the financial knowledge and independence they need. Unfortunately, it can be hard for women to find advisors that they can trust. **The Women's Choice Award is the only recognition program for advisors who are committed to the women's market and serving their female clients. Therefore, I proudly display the Award emblem and plaques wherever I can, including in my email signature line, on my website, and throughout my office.**"



## SUCCESS

"Although many women clients have commented on the Award and how impressed they are, we recently received a wonderful opportunity that stemmed from our award and our commitment to advancing the needs of women. We had two women attend our women's empowerment workshop several years ago, and despite our follow up, we never heard anything more from them. And then, seemingly out of the blue, the women called and we discussed the work we are doing for women and the recognition we are receiving for that work, including the Women's Choice Award. As a result, they invited us to visit their corporate headquarters to speak to their women's networking group, which included over 90 people! Moreover, after that presentation, they asked us to put together a monthly workshop schedule so that we can return again and again!!" Educating women and their families on their financial options is our mission and the Women's Choice Award helped us fulfill that mission!

**"We consider that a huge win for everybody!"**

1 "How to find a financial advisor/planner" by Troy Segal

To learn how we can support your success, please call (954) 922-0846

or email [rcastillo@womenschoiceaward.com](mailto:rcastillo@womenschoiceaward.com)