Advisor Showcase – Jeff Werner on Advisor Sleeve and Financial Technology That Enhances Your Value

LPL Advisor Showcase LPL Advisor Showcase

Managing Your Business Practice Management

Jeff Werner turns to LPL Financial's Advisor Sleeve for sustained growth and business opportunities

Jeff Werner had more than 20 years of experience working as a financial professional before transitioning his practice to LPL Financial. Four years into his partnership, the CFP and senior vice president at Central Investment Advisors of Springfield, MO reflects on his success, and cites Advisor Sleeve as a significant game-changer for his practice.

Advisor Sleeve allows advisors to build and run models within Model Wealth Portfolios, bringing together the best features of both – an advisor-driven platform and a centrally managed platform. Now Jeff's leveraging Advisor Sleeve's capabilities to highlight the unique value he can bring his clients.

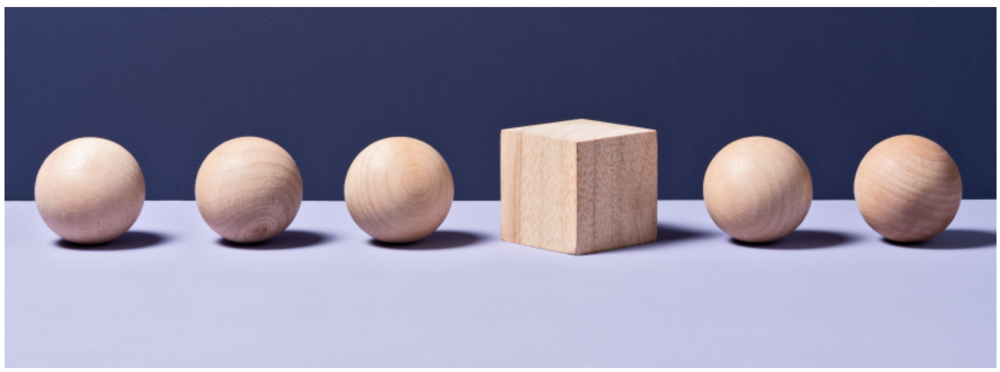
"We're in a business of giving our opinion and Advisor Sleeve allows you to design a portfolio that reflects your beliefs."
– Jeff Werner, Senior Vice President, Central Investment Advisors

Honest advice is the real differentiator

Jeff understood years ago that while financial planning is based on commodities, it's the service aspect that provides the greatest business opportunities. "Financial advisors all sell the same stuff. In a commodity business, similarities don't sell. Differences do," he said.

Recognizing his honest opinion is the real differentiator among his competitors, he never shies away from sharing his beliefs openly and honestly with his clients. Advisor Sleeve is another tool he can use to deliver that personalized, honest advice.

For the independent-minded financial professional, Jeff feels Advisor Sleeve offers two compelling benefits that set it apart from its competition. "We're in a business of giving our opinion and Advisor Sleeve allows you to design a portfolio that reflects your beliefs. It completely automates the backend. There are no trades. Once your model is built, there's nothing you have to do. It's on automatic pilot. You set it and forget it, and I love that," he said.



Automated success is well worth the cost

While at first he was skeptical placing his trust in Advisor Sleeve's automated process, that quickly changed. "As soon as I opened up my first account and didn't have to put any trades in, I was sold. I couldn't believe it. You can do systematic investments. You can do systematic withdrawals – money going in every month. Nobody does that on SAM [Strategic Asset Management] because it's a hassle. Advisor Sleeve has pretty much been our practice over the last couple of years. If I've opened anything other than an Advisor Sleeve, I don't remember what it is," Jeff said.

Jeff feels some industry colleagues have shied away from Advisor Sleeve because of the cost, but he's only experienced an upside since investing in the financial technology.

"Quite a few people are worried about the cost of it. I know I was initially. But you have to focus *not* on the cost, but on the value that you get in return. We have almost 300 accounts on it now and I don't have to trade a single one of those. Advisor Sleeve has saved me a ton of time, which has really helped me go where my strengths are," Jeff said.

Those strengths include strategic planning – a time-consuming pursuit he's free to focus on since realizing the automated efficiencies of Advisor Sleeve. "It allowed me to spend time where I'm most comfortable, which is on the strategic thinking side," he said.

During the COVID-19 lockdown, Advisor Sleeve made all the difference for Jeff. "We never would have survived without it. We didn't have to worry about it, we had everything set in motion," he said.

Staying the course

Jeff joined LPL in 2017. Four years later, he's committed to sticking with Advisor Sleeve, and is thrilled with the financial independence and technology his partnership with LPL provides him. "I was really excited for it. Being independent lets you be you. For the foreseeable future, I am not planning on making any changes or going with another platform," he said.

Interested in finding out how Advisor Sleeve can impact your practice? ***learn more>>***

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