

INVESTING IN GREAT COMMUNICATIONS

Interpersonal communication – the process of sending and receiving messages between two or more people – is the foundation of all personal and professional relationships. A communication breakdown can affect the momentum and outcome of a dialog, a situation or a project, and can leave people feeling unheard, disappointed and powerless.

According to reports on the financial industry, one of the top reasons investors leave their existing financial planner in search of another is due to what the client feels is a lack of communication on the part of the adviser.

Ned Tufekcic, founder and CEO of ProInvest Financial, Inc. told *The Suit*, “It is often perceived that financial professionals are in a front-loaded relationship with the client, where all dialog is at the beginning of the process. However, the key is a level communication approach throughout the relationship.” He continues on to say that many initial plans mature and become less viable, so financial planners need to update routinely, ask questions often and not make assumptions. Tufekcic credits proactive communication, along with planning and risk management, as reasons that the economic downturn of 2009 had minimal impact on his clients.

ProInvest Financial is based in Pepper Pike, Ohio, an affluent suburb of Cleveland, specializing in comprehensive financial planning and investment solutions for business owners and pre-retirees. Their services include investment management, asset allocation analysis, business continuity planning, estate planning and retirement planning. While some financial advisers may boast about returns, Tufekcic takes pride as he watches his clients grow, both professionally and personally. He calls it a “rewarding two-way

process” as those who have relied on his advice make some extraordinary leaps in their own lives.

Digital marketing helps ProInvest Financial both educate and communicate with their clients. The firm maintains a robust social media presence and believes that doing so reinforces relationships. “Meetings don’t have to be in person,” said Tufekcic. “We now have an extended platform by which we can communicate with clients using Skype, GoToMeeting and other digital venues.”

Though most ProInvest Financial clients are members of the baby boomer and Generation X cohorts, Tufekcic’s commitment to Generation Y is impressive. “We owe the millennial generation in this country the opportunity to receive competent financial advice, shepherding, and nurturing. We owe them delivery of the outcome that they perhaps don’t see yet in their own dreams, but what they will ultimately seek,” he said.

Currently, Tufekcic is searching carefully for a millennial-aged adviser to bring into his firm, intending to mentor this person toward full partnership. “I want to develop a succession plan that is the envy of all my peers,” he said. “If we are to sustain what we have done so well, we need to look toward the millennial generation.”

Ned Tufekcic is a registered representative and investment advisor representative of Cambridge Investment Research Advisors, Inc. a Registered Investment Advisor.

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