

This **company story** was drafted for Pension Professionals. The firm was looking for a short, one page story that highlighted their commitment to investing their client's assets in a manner that was consistent with the core values and spiritual beliefs of those clients.

## **Pension Professionals – Company Story**

### **Merging Assets and Spiritual Values**

Quite often, people's financial affairs are in conflict or disarray, consuming their valuable time. Pension Professionals realized this and saw a striking need for a fresh new approach to financial planning that would cut through the haze of confusion.

The company was not only dedicated to **simplifying the process**, but to transforming it as well. Bringing it to a place that finally takes into account the client's core values and spiritual principles. At long last, this new direction for financial health acknowledges the client's need to realize his or her life purpose, while achieving financial well-being - leading to a **more satisfying and meaningful life**.

It's this holistic approach at Pension Professionals that galvanizes their expert team of advisers to put the client's financial resources into perspective, based on the individual's core values, beliefs and life purpose.

### **The Personal Touch**

Instrumental in understanding these principles is a **Life Coach** – someone who works with the individual to help define and articulate what is important to them. Pulling the entire process together is the Client Services Director at Pension Professionals, who continually monitors the process and takes action to implement the client's decisions as the needs arise.

Over the years, Pension Professionals has practiced what it preached in its own work environment. Employees were attracted to, and selected by, the company based on their commitment to **self-awareness** and identifying their own values, beliefs and purpose. This commitment to employees would prove invaluable in securing the trust and respect of the clients.

### **Good News for Modern Investors**

Roland Gagne and Richard Butler's bold vision to create both financially secure and meaningful lives is no longer a dream. It's a reality. As it turns out, it's not only good business – **It's Good News!**