

## **The Great Eight *featuring Greg Workman***

1. **Jim:** Tell us a little bit about your career, what was your inspiration for becoming a financial advisor?...

**Greg:** My father inspired me to pursue a career in personal finance. My dad had limited resources and taught himself how to make the most of them through disciplined saving and investing. Once I learned about the power time and compounding, there was no turning back!

2. **Jim:** Why did you choose KFS?

**Greg:** I was recruited to KFS by Michael Doucette, our Chief Operating Officer. I was a member of Mike's team at a previous employer. I have learned a lot from Mike - he leads by example and is passionate about taking care of clients. I can see why Kelly Kelly chose Mike for this leadership position.

KFS has great clients and it has been a pleasure getting to know them - I look forward to more face-to-face interactions as the pandemic distancing restrictions fade away.

3. **Jim:** What would you like to accomplish here?

**Greg:** I'm a lifelong learner who is someone that keeps acquiring new skills and capabilities (on and off the job). I want to continue to educate myself and be the best advisor I can be.

4. **Jim:** What's been your experience at KFS so far?

**Greg:** Kelly Kelly has a great team in place - quality people that care deeply about providing a client experience that exceed expectations. Bill Kelly started something special and it is our responsibility to carry on his legacy of service to clients and the community. It is a nice feeling to come to work every day and be a part of something great.

5. **Jim:** How has the advisory business changed since you first started in the business?

**Greg:** There has been evolution and disruption - the emergence of the internet, the dot-com bubble of 2000 and the 2008 financial crisis. I am fortunate to have lived through boom and bust as an individual investor and an advisor - those experiences are invaluable and make me a better advisor. The industry changes and evolves, but I work towards the same goal: helping clients plan for the future and attain peace of mind.

6. **Jim:** How do you approach the advisory side of things... Do you have an overarching philosophy that guides you in how you service clients?

**Greg:** It is very important to start where the client is - usually that means good listening. Treat others as one wants to be treated and exceed expectations whenever possible. I am passionate about financial education and enjoy working with clients that want a little education along the way.

7. **Jim:** What hobbies or other interests do you have outside the office?

**Greg:** I am passionate about travel and have visited 26 countries to date.

**Jim:** Wow! 26 countries... Tell me more.

**Greg:** My favorite place to travel is anywhere in Europe. But the most exotic place I have visited has to be the Galapagos Islands. And the most interesting and fun? I would say Iceland.

I also enjoy landscaping and tackling home improvement projects - although some of them tackle me! My wife and I are very close to family and value spending as much time as possible with loved ones.

8. **Jim:** Favorite: meal, movie, music?

**Greg:** Meal: Veal Parmesan followed by my mom's apple pie topped with Crescent Ridge vanilla ice cream. Movie: 1983's Trading Places Starring Eddie Murphy and Dan Aykroyd. Music: Motown and 60's/70's Classic Rock.

*This content is for informational purposes only and does not constitute an offer to sell or a solicitation of an offer to purchase any interest in any investment vehicle managed by Kelly Financial Services, LLC, its subsidiaries and affiliates. Kelly Financial Services, LLC does not accept any responsibility or liability arising from the use of this communication. All investments are subject to risk including the potential loss of principal. No investment strategy can guarantee a profit or protect against loss in periods of declining values. No representation is being made that the information presented is accurate, current or complete, and such information is at all times subject to change without notice. The opinions expressed in this content and or any attachments are those of the author and not necessarily those of Kelly Financial Services, LLC. Kelly Financial Services, LLC does not provide legal, accounting or tax advice and each person should seek independent legal, accounting and tax advice regarding the matters discussed in this communication.*