HOW INNOVATION AND CREATIVITY HELPS WATSON INVESTMENTS

By Jennifer Watson

Always looking forward, welcoming new technology, and continuously improving are some of the key reasons to our firm's success.

When asked to share in this magazine what we did during COVID-19 that has made us stay successful … I reflected.

My business mentor, partner, and Dad, Peter Watson, always promotes continuous evolution and learning. A case in point is his belief in our team taking on-going courses: if we are not changing and improving, then we are declining. We are proud to be ahead of the curve on learning and innovation fronts.

Because of these strong principles entrenched into Watson Investments, we were able to quickly adapt to new ways of working from home and hosting client meetings fully online during COVID-19. We pivoted smoothly and played our part in helping combat the pandemic.

Our success over the last six months stems directly from our firm's four key principles.

CLIENTS FIRST

We have earned the trust of our clients and put their needs first. What our clients enjoy is the fact that we are available, approachable, and helpful.

PROCESS AND PLAN

Our unique and defined process and the fact that every client has a solid financial plan allows them to feel secure, even in times of uncertainty. We plan for various life scenarios, and the unknown. Planning, structure, and forecasts creates comfort.

TEAM APPROACH

A team approach allows more hands-on-deck for times where speed and personalized service is best. Having a dedicated team of professionals who have a caregiving personality helps to spread our message to all of our clients while still maintaining a high level of holistic service. The team's willingness to adapt to technology during COVID-19, like with Zoom Meetings, Electronic Sharing and Signing Documents. Our 'tech savvy' adaptable team deliver a great client experience with the high-quality service we always promise.

COMMUNICATION

We increased communication with our clients, team, suppliers, and other business owners and leaders. We increased our communication to our newsletter email contacts, started doing live webinars (recordings found on YouTube, searching Watson Investments), and we launched an Instagram account: @Watson.Investments.

CONCLUSION: LOOKING FORWARD

In my view, the future of our industry will involve more people paying closer attention to their wealth and realizing that if they did not get great service this past year in particular, or don't have a written financial plan, then a change is needed.

We will continue to see a trend of clients moving from investment only advisors to companies that take a holistic approach to wealth management, managing investments, as well as financial plans, retirement plans, risk management, cash flow projections, estate planning, to name a few.

We will continue to be there for our clients and help them have the best-customized plan that leads them to continued financial success.