



The Rep Chronicles

Quality of Service
Makes a Big Difference
to a Small Team

As the investment specialist in a 4-person financial services team, **ESI Advisor Brian Vieselmeyer** already had a successful, well-established practice when he joined ESI and National Life. In this interview, Brian shares why he made the move and the impact it's had on his business.

What brought you to National Life and Equity Services, Inc. (ESI)?

■ **BRIAN:** I was introduced to ESI and National Life through a personal relationship.

You are part of a 4-person team – how did that work?

■ **BRIAN:** The team I work with develops holistic plans for clients and includes specialists in investments (myself), traditional life insurance, retirement planning, and health insurance. If we were going to make a change, it was going to be all or nothing. We've always worked as an integrated insurance/BD relationship. Fortunately, we were all in agreement.

Changing technology can be a big challenge for advisors transitioning to a new Broker Dealer. How did technology factor into your decision to join ESI?

■ **BRIAN:** I was already using Wealthscape, M&O, and Investigo. Only Docupace was new to me, and the training support that ESI provided had me up to speed quickly. So that certainly made the transition easier.

“The quality of the service people at ESI is far and away better than my previous company ever was. I’ve been doing this long enough that if I’m calling, the question is generally not an easy one, so being able to get in touch with people and have them understand what you’re talking about has been tremendous.”

What was the biggest reason for making the change?

■ **BRIAN:** Relationships and service. If I think about the positive impact that this change has had on me, it really comes down to the relationships that I've built over the last 18 months. In the 10

years I was with my previous company, I never really built relationships with anyone there. It was just sort of an anonymous 800# that I called from time to time. At ESI, anytime I call, I pretty much know who it is before they say their name; I know their voice! So that level of service and relationship has great.

Quality of service has had a big impact too. The quality of the service people at ESI is far and away better than my previous company ever was. I've been doing this long enough that if I'm calling, the question is generally not an easy one, so being able to get in touch with people and have them understand what you're talking about has been tremendous. At my previous company, you had to wait in a phone queue for 10 minutes, and then you were put on hold when they didn't know the answer. Having that high level of service has been the biggest thing for me, personally.

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What kind of impact has joining ESI and National Life had on your business?

■ **BRIAN:** Our team is very integrated and experienced, so if you bring us new and interesting ideas, two or three people immediately come to mind. For the most part, all of our business comes from business clients and their employees and having access to the life side's Advanced Sales team has introduced us to new concepts in that market. As a result, we're writing business that we wouldn't have otherwise. In fact, we've been working on premium financing cases and trusts that were never put in front of us before. It's helped us further diversify what we offer our clients.

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It sounds like you don't have any regrets about your move.

■ **BRIAN:** No regrets. It's been a great decision for us. Like I said before, so much of what makes ESI and National Life a successful partnership for me is the culture of the company - the relationships, the service – it's not something you can quantify in numbers, but it's so valuable.



Brian Vieselmeyer began his career as a financial advisor in 2005. In 2012 he joined Corporate Plans Retirement Strategies, LLC as a partner where he brings his investment expertise to the many business, professional and personal clients they serve.