

November 1st, 2024

Hi there!

I am pleased to introduce myself and explain the work I've been doing for TruStone, along with the help and direction of Jeff Davis, Jason Julian and James Deakin.

I am a licensed and contracted TruStone advisor. My focus is on representing leading-edge products and services that can be sold with confidence by TruStone reps to their Group and Individual clients.

My goal is to help you so you can understand and promote and sell these products, where appropriate and step in to partner with you to achieve a great client experience.

With regards to VUMI – standard compensation to the Broker is 10%. Brokers contracted individually with TruStone will earn all 10% and qualify for all future VUMI contests and promotions based on sales. This income is recurring – so you can truly bring a valuable and timely offering to the market and be compensated for your on-going dedication and service to your clients.

My job is to help you and answer your questions so you can be self-sufficient on both Individual and group cases. Should you wish for me to get directly involved with your clients and sell the individual or group VUMI case – we will share the 10% comp paid by VUMI, equally (5% each and cumulative). Even with my help, It is likely we will work together so you can maintain good compliance protocol and learn about additional ways in which you can serve the client.

Want to hear more? Let's chat!

Bob Carter BA, GBA, CIM, LLQP

Bob.carter@carterconsultingcorp.ca

Cell: 437-989-4262

Also available on WhatsApp

