BDWM Ask the Experts | Caring for Clients Video Transcript

## George Sparks, Director

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George Sparks ([00:10](https://www.rev.com/transcript-editor/Edit?token=433uu0Tn59pHCzQPKFECahSvVdNhny_HfXMtg7Ww4PBWe3l3pbxnw6_wKqEQobEO-gnxb3n9u_zdN8gVh9FfolgXpls&loadFrom=DocumentDeeplink&ts=10.76)):

A lot of our clients were really just in the need for better advice. We would look at tax returns, and we would see fees that were being paid, but no advice. And as we started talking to our clients about this, they just kind of said, "Can you guys do this?" And it kind of follows along, I'm sure you've seen studies or heard studies that the CPA is one of the most trusted advisors. And anyway, this is just where this falls in, because we kind of have a tagline a little bit here in financial services, that a lot of our clients are large enough that they need professional care, but maybe their investments aren't large enough that the true professionals care about them, and that's really where we're trying to fit in.