

# Member Highlight

Please see the interview below and if you haven't met Joan yet, make a point of introducing yourself at the next meeting! New Members bring greater diversity to our network of financial professionals and more opportunities for collaboration! Invite a professional you respect to join you at an upcoming program. Information and registration available at [www.sfsptwincities.org](http://www.sfsptwincities.org)

## Meet New Member Joan Gilles



**Name:** Joan Gilles

**Professional Designations:** CRPC, CLU, ChFC

**Where did you go to college?** I'm very Midwestern. I grew up in Eastern Wisconsin and went to school in Iowa (Luther College) and I've lived in Minnesota since 1982.

**Share some information about your practice/firm.** I call myself a financial advisor & coach. I have the experience and expertise to help turn the complex into something understandable. Most importantly, I care about client's and seek to build relationships based on trust and transparency.

### Contact Information:

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**What do you specialize in?** I believe that most people have the capacity to manage their own financial affairs, but lack the time, inclination and desire to do it themselves. That's where I come in. I am an advocate to ease my client's biggest financial worries and give them the control, certainty and quality of life they seek now and in the future.

**What are your current professional concerns/challenges?** I just moved my practice from Ameriprise and am working to grow. I'd love to hear ideas about how to get connected with the right people.

**What kind of clients/customers do you like to work with?** My specialty is clients facing some kind of change. Most often I work with women and professionals. I listen carefully so I know what is really important to them. Once I get to the heart of the matter, I can help empower meaningful change through a holistic, life centered approach

### What my clients say is my greatest strength:

*"Joan is an amazing communicator. This starts with being a very good listener. She is patient and compassionate with what can be an emotional element in my life."*

*"A respectful professional who treats other people's money as if it were your own while collaborating with the client to meet their level of comfort and risk."*

*"Looks out for her client's best interests"*

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*“Your ability to take all sorts of small pieces of information and put them together into a cohesive plan.”*

*“Customer focus – the customer comes first”*

**Who introduced you to the Society of Financial Service Professionals?** Carole Evenchik and Jim Millikan.

**How can being a member of FSP help you in your practice?** I am dedicated to learning and growing in this profession and I believe the Society of FSP can help me do that.

**Share some personal information about you as a person and your life outside of work:** My

husband Scott and I are empty nesters with 2 grown daughters. When I’m not working (which isn’t very often!), I enjoy gardening, reading and fishing. Scott and I love to travel and are looking forward to the next big adventure.

Thanks Joan!

We look forward to your participation in FSP-Twin Cities!

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