

Presenting Our Featured Member...

Morgan Stanley – The Johnston Group

Scott Johnston ~ Nichole Moles

Member Since February 1984

The Johnston Group at Morgan Stanley, created in 1963, has 62 years of experience using the resources of a large Wall Street investment firm to deliver friendly and uncomplicated investment advice to real people with real questions. We measure our success in generations and are thankful to have many fourth and fifth generation clients that count on us for their investment needs.

We are *financial map makers*. A client or prospect comes in and says, “My friend says you showed him how to ...” What we hear is, “I am currently HERE; I would like to be THERE. Can you show me how to get there as efficiently as possible?” Then we start to draw the map. We are obsessively client oriented because we only work with less than 150 families per advisor, rare for an industry focused on accumulating clients. By keeping the number of our clients low, we are able to provide exceptional service that is tailored to the individual’s needs.

We are always looking for great clients to work with. The #1 reason clients leave their existing advisor to come to us is “I can’t get a hold of my current advisor.” That is also the 2nd, 3rd, and 4th reason! If you hear a friend or business contact mention the market, just say “I’ve got someone you should meet” and see where it goes. If they’re interested, they’ll jump at the chance to be recommended.

Our best clients say that time management is the single best thing we offer. They are generally busy, happy people that enjoy life and do not enjoy researching the investment markets. The best leads for us are notices of life transitions. We make maps, so dots on the map are reasons why prospects seek investment advice. Some examples of dots from this past year’s prospects that became clients – **selling a business, approaching retirement, going through a divorce, loss of a parent, corporate mergers and tax law changes to retirement plans**.

If you want the power and capabilities of a global financial institution delivered in a friendly and uncomplicated fashion – think **The Johnston Group**.