

Building a dream team with a positive and supportive attitude with Fred Evans, Financial Advisor and Business Owner

DREAM TEAM LEADERSHIP SERIES



Starting as a young agent at London Life, Fred Evans was determined to learn as much as possible. Telling his team to give him the tools he is going to need along with training and support, Fred would give back the effort required to do the job well. Thrown into the “new man’s school”, Fred tells us that he had a great opportunity to learn from seasoned advisors that ultimately built the foundation for his success. Now the owner of his own business for over 20 years, Fred strives to help his clients and their families achieve financial freedom through the management of their financial resources. Fred’s PI profile is one of high collaboration and persuasiveness with a harmonious style of communication along with a large capacity to absorb stress.



Have you ever been a part of a dream team?

As a young agent, I was in team situations where the competitive energy was there. We would have Monday morning kick-off meetings where we would see what everyone else was up to that week. Twice a year, they would run a sales campaign where we would compete against each other for five weeks for the chance to win prizes and rewards. Throughout that time, we would meet in the boardroom and tell each other what we sold, so it was a motivating meeting if you did not want to walk in with zero to report, the pressure to do well was really high. In and around 15 years, I felt that I needed to represent more than just one insurance company and offer my clients a broader product shelf, so I moved on. A couple of other opportunities came my way before I decided to go out on my own around 20 years ago and start my practice.

What has been your driving force for success?

Motivated by a Manulife initiative called the Master Builder Program, winners would receive a green jacket like the Master’s Golf Tournament after meeting certain criteria to be awarded a star into the five-star system. I got the five-star a couple of years ago and it helped in motivating us because it was a “carrot to run after” to reach our goals and earn the first star. I’ve always resonated with the quote that goes “attitude not aptitude determines altitude”, as a big attitude person and believer in a positive attitude as a key factor for success.

What does it take to be a leader and build a successful team?

As they say, there is no “I” in a team, it’s about getting the right people for your team that can share in your vision and know that actions speak louder than words. As a team you have to think, is the work we do quality? Is it something to be proud of? As a leader, you have to be honest with people, work hard, lead by example, and align with your philosophy and business plan. Your people will believe in your mission if you have a positive attitude and show them the value of your experience - once you have that, you need to lead with the attitude of “we can all learn and grow together.” As a leader, when I get the call that something is awry, I try to find a solution instead of getting upset. I lead with a proactive, flexible, and supportive attitude – recognizing that we’re all in this together and that my success is going to be your success.

Do you have any advice for new business owners?

If I were to go into business today, I would try to get meetings with other business owners to get into their world to understand the different layers and hats that business owners wear. It is important to recognize that as the business owner, you are the captain of the ship, you must know how to prioritize your ABCs, and understand that business is a process and that succession planning is equally as important as day-to-day business operations. We try to help our clients think about their exit strategy and that can take 5-10 years to recognize and identify a successor and to put the pieces in place to ensure a smooth succession of the business and that also means better value for everyone.

