



## KIM BROWN

### JNBA Financial Advisors

JNBA Financial Advisors already was known for its premier customer service when Kim Brown joined the firm, but she helped cement this reputation by shaking up the way advisors approach their work. Instead of having them serve clients individually, Brown created wealth management teams staffed with internal experts in financial planning and investments to offer more comprehensive guidance.

A cutting-edge structure at the time, it was in sharp contrast to a traditional silo format. But Brown sold JNBA on the new team structure, arguing that it helps the firm provide broader and more in-depth advice, greater personal attention to clients, and additional flexibility for employees as they share their workload. Always motivated to innovate in pursuit of great customer service, Brown also created an operations team at JNBA; the team handles all of the details and paperwork so advisors can devote their efforts to client-facing work.

Brown's changes have paid off enormously at JNBA, which boasts an astounding client retention rate of 97 percent. During these enormously stressful economic times, not one client has left JNBA, thanks to its high-touch model of customer service. These initiatives, and others, have boosted firm assets from new clients by 164 percent and helped elevate the firm's national visibility, including being named a Top 100 independent financial advisory firm by Barron's.

"Teamwork is at the heart of every successful organization, and I'm proud of getting people to work together in teams and support each other and have fun doing it," says Brown. "Everyone's role on the team is equally important and everyone has the same goal of doing what is right for our clients, even when no one is watching."

Brown is an active volunteer, serving each summer as an Angel Foundation camp counselor for children whose family members have cancer. She offers her expertise in finance by counseling women and families, while also raising money for the Special Olympics. This year, JNBA provided internships to three University of Minnesota—Duluth business students to help educate and train future financial advisors.

— SUZY FRISCH



**EDUCATION:** University of Mary, B.S. in business administration and marketing

**WORK HISTORY:** JNBA Financial Advisors, President, 2005 – present; Colle + McVoy, Senior Vice President, Group Director, 1989 – 2005