



Our 2011 Staff of the Year

By Angela Cappello Sarver

The most anticipated event at every Advanced Topics Symposium (ATS) is the presentation of our annual Staff of the Year awards, celebrating the achievements of field staff. This year, we honored four exceptional individuals, who, altogether, have a staggering 68 years of industry experience!



Left to right: Joni Youngwirth, managing principal, practice management; award winners Debbie St. John, JoAnn Spoto, Kelley Walton, and Carolyn Marshall; and Maria Considine King, director, practice management

- **Debbie St. John**, director of client services, Connecticut Investors Group LLC (20 years in the industry): Jeff Segal described Debbie as tireless, arriving at work daily at 7:30 A.M., not taking lunch, and leaving only when the job is done—often not before 6:00 P.M. Debbie is the committed, knowledgeable, and friendly person who comes to mind when we look to define “best support person ever.”
- **JoAnn Spoto**, client relationship manager, Academy Wealth Management, Maitland, Florida (19 years in the industry): Advisor Eric Reinhold says clients call JoAnn to get issues handled immediately. She is tenacious in working to resolve all matters to their complete satisfaction. JoAnn is also compassionate and empathetic, visiting the firm’s elderly clients at home and meeting them for lunch to find out how life is going.
- **Carolyn Marshall**, administrative assistant, Asset Advisory Services, Jupiter, Florida (12 years in the industry): According to her boss, Curt Francisco, Carolyn is an efficient team leader who always puts clients first. She can explain complex financial information to them in a down-to-earth manner. Carolyn, too, is tenacious, following through to the very end to resolve client issues.
- **Kelley Walton**, client service manager, S. Andrew Walton Investment Planning, Birmingham, Alabama (17 years in the industry): When her firm merged with another practice, Kelley coordinated the integration—a daunting task. Though given limited direction, she grabbed the reins and led the team in accomplishing the tasks at hand.

Angela: What's one area of expertise you've developed since joining your firm? What steps did you take to hone your skills?

JoAnn: Exceptional service is essential to setting our firm apart. As a follower of Christ, I'm called to serve others, to develop my God-given talents, and to use them in my professional and personal life. I strive to respond to others with compassion, integrity, accountability, and discipline.

It's important to keep up with our ever-changing industry and to dig deeper to learn more. I ask questions of my advisor, peers, and back office staff. Commonwealth is a fantastic resource, and I take advantage of that as much as possible. I may ask a member of the Service Center about alternative methods for completing a task or why something is so. Reading industry-related materials is also beneficial.

Carolyn: I've become proficient in creating and maintaining a concierge list of trusted referral services. Specifically, when a client asks us to recommend an area dentist, CPA, or attorney, I'm in a position to refer them to some trusted firms.

Kelley: A lot has changed since we joined Commonwealth in November 1999, with advancements in technology the most obvious. I take advantage of software allowing me to prefill as much information as possible and e-mail almost complete applications or forms to clients. If clients e-mail the documents back, the entire process is paperless!

Angela: What are some best practices for keeping up with the changing knowledge base you need for continued success?

JoAnn: I've developed written processes, checklists, and templates for accomplishing tasks efficiently. For instance, for client reviews I've created an itemized checklist, from cover page to disclosures—and for every potential report in between. We use a few customized reports I've developed (Compliance-approved, of course), as well as many available through Commonwealth. The checklist helps me maintain consistency and enables me to make the best use of my time.

Carolyn: I follow the adage, "Everything in bite-size pieces." I also stay connected with the Commonwealth home office, taking advantage of its indispensable support. Specifically, this helped us switch from GoldMine to Commonwealth CRM with minimal down time.

Kelley: Over the past decade, access to technology has made the biggest difference. Using it, my focus for 2012 will be to market to our client base, touching each family with more consistency and with a little creativity. With competition fierce, I want clients to become intensely loyal to us. When things get volatile, there'll be no question about who's working hard on their behalf. And they may even tell their friends.

We congratulate our winners and hope that, as you prepare your goals for 2012, you consider the benefits of attending ATS. Why not include it in your learning plan?

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