

## Case Study

# How Asset-Map Helps Valley Strong Credit Union Build Trust and Confidence with Its Clients

**THE FIRM**

Established in 1938 in Bakersfield, California, Valley Strong Credit Union provides personal and business banking services, loans, and retirement planning services for the entire San Joaquin Valley.

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**Richard Ramos**

*LPL Financial Advisor, Valley Strong Retirement & Wealth Management Group*

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**THE STORY**

Like most banks, Valley Strong's clients tended to be more transaction-oriented for many years. They wanted a financial institution they could trust, and also one that allowed them to do their business quickly and efficiently.

As he worked with the credit union's clients, however, Richard Ramos wanted to engage them more intentionally about their goals and financial plans. That way, his clients would be able to think about Valley Strong as a true financial partner, and not "just" a bank.

He found what he was looking for when Valley Strong implemented Asset-Map in 2018.

In particular, Richard has discovered four ways that Asset-Map helps him develop stronger relationships and engage in effective decision-making with clients.

## FOUR WAYS ASSET-MAP HELPS RICHARD RAMOS ENGAGE CLIENTS



Organize thoughts and manage relationships with complete clarity.



Take inventory of liabilities and assets to understand the client's complete financial situation.



Quickly complete prep work to be fully prepared for meetings.



Keep clients focused and engaged during financial discussions.

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*Asset-Map is the focus for how I guide relationships. I'm more confident in my ability to discuss my clients' complete financial situation and clearly show them the gaps they may be missing. It keeps my clients and I engaged and in tune with each other from one meeting to the next.”*

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**Develop credibility and trust in your bank's wealth management services.**

Learn how with Asset-Map.



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