

Ep #137: Taking Over the Family Business with  
No Experience with Taylor Demars

# NEW PLANNER PODCAST



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**With Your Host**

**Caleb Brown**

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## Ep #137: Taking Over the Family Business with No Experience with Taylor Demars

Welcome to the *New Planner Podcast*, where it's all about helping you successfully enter the financial planning profession and accelerate your financial planning career.

This podcast will help you understand the profession, become familiar with the various career paths available to you, and avoid the mistakes that limit your success.

Join your host, Caleb Brown, to explore the human side of creating a successful planning career through interviews, personal experience, and insights from the trenches.

Let's get started.

**Caleb Brown:** Welcome to the 137th episode of the New Planner Podcast, this is Caleb Brown, your host. My guest today is Taylor Demars, a financial planner with Demars Financial Group in Spokane, Washington.

Taylor joins the show today to share his path to entering the financial planning profession, starting with how he had thought about becoming a planner early on, but wanted to try something different.

And after pursuing a supply chain in logistics education and completing several internships with large corporations, joining the smaller family-owned financial planning business his grandfather had started, seemed like a better lifestyle fit.

He talks about a decision his father made that would remove himself from the business for three years, which would thrust

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Taylor into running the firm and becoming the primary client advisor after only a year from when he joined the firm.

Listen in the middle where he shares how he found another local advisor to help with the client load while Taylor got up to speed, what struggles he had to overcome, what his biggest fears were and how he overcame them.

How he gained the technical knowledge required to become a lead advisor with virtually no experience, how he developed confidence, leadership, and trust among the team, and how the business has thrived.

Check out the end too, where he talks about what will happen when his father returns, what his future plans are, and some final tips for new planners.

If you're a new planner and you're being pushed way out of your comfort zone and aren't sure you have what it takes, then this episode is for you.

Hey Taylor, welcome to the New Planner Podcast.

**Taylor Demars:** Hey, thanks Caleb, appreciate you having me on.

**Caleb Brown:** Absolutely, I'm excited to talk to you. You come highly recommended, and you've got a unique story and I want to get to that sort of where you are right now and what you're doing in the firm.

But maybe just to set the context, just take us back. I mean, you're a career changer, so just talk to us about what you were doing before you were a financial planner and then we'll just work our way up to where you are now.

**Taylor Demars:** Sure, even before, I guess, embarked on any career, maybe helpful for some context, as you know, my dad is a financial advisor, my grandfather's a financial advisor, so it would've been pretty easy for me or an outsider to think, "Hey, he's going to be a financial advisor."

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And that was my thought a lot of the time growing up, just because it seemed like the natural path, but I wanted to try something different. So, when I did my undergraduate degree, I pursued global supply chain of all things.

So, before the supply chain path, I wanted to explore my own viewpoint, if you will, didn't want to just take the straightforward or easy road. So, did some aerospace internships that led to a Boeing internship. I did some summer sales in between, that taught me a lot.

And I really enjoyed Boeing, I thought I was going to be there forever. And then an opportunity came up for me to do an internship at Tesla, and I thought that was a once in a lifetime opportunity.

So, I jumped over to there and I think each of those experiences gave me a very intense but brief view into what a career would be in each of those areas. And I in fact, did another internship with Northwestern Mutual, and each of those flavors taught me what I did like, what I didn't like.

I intentionally went for Northwestern Mutual because I thought, "Hey, this is the same industry as my dad," and I just didn't know what I didn't know at that point. And I quickly realized that it's just a glorified insurance salesman, at least the internship position that they offer.

I think they have a broad original long-term **[inaudible 00:03:56]** but it definitely wasn't the type of path I wanted to take into the industry. And so, after all those experiences, I rounded out to say, why not do an internship with my dad?

So, I went ahead and basically shadowed him, participate, and helped him for several months. And I really got to just literally hang on his elbow and participate in every single thing he was doing from the client reviews to the behind the scenes planning and management.

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And I really got an exciting view into that, and it really felt like the most risky option of them all, being a self-employed entrepreneur, financial advisor, as opposed to the more stable paths that are out there with the larger company. And so, I figured earlier in my career, I could take a risk, the better, not that I couldn't later. And so, that's the path I ventured towards.

And before I could fully get in, my dad said "Well, I have some prerequisites for you." And those included, getting an MBA and as well as getting a CFP certification soon as possible in addition to the investment licenses of course. So, I guess in a nutshell, that's a bit of where my navigation was into the industry.

**Caleb Brown:** So, thanks for sharing that. So, he didn't make it very easy, did he? MBA and CFP, I mean, that's not a slouch, I mean that's a lot of work.

**Taylor Demars:** I think it was twofold. One, 20 years into his career, he got his MBA and he felt like it benefited him, benefited his credibility. So, he wanted me to get that leg up as early as possible, same with the CFP.

But you're right, I don't think he wanted to endorse any sort of nepotism and especially from the client's perspective, make them feel like they were getting a down step in quality just because the third generation came in. And so, I felt like I had to work for it and even more so, once I actually started being with clients.

**Caleb Brown:** And talk about that a little bit more, because your dad had a firm, he wasn't working as an advisor for someone. I mean, you guys have a family business. So, maybe just talk about that, I think you mentioned your grandfather, I mean, did he start it and is that where it is now?

**Taylor Demars:** Yeah, so briefly put, my grandfather retired from the Air Force, from the local Air Force base and just started back in the

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seventies like most did in the insurance side. And that's what they did, or he did at the time.

And at the time my dad joined him, they branched out into more general financial planning. I think they were more on the earlier end of the cusp of holistic financial planning fee-based and so on, and the practice has just grown from there.

Today, we're north of 200 million in assets, 300, 350 households. So, probably a relatively bigger fish in the small pond, I guess you could say.

So, yeah, there was a well-oiled machine by the time I got my hands dirty and insight into what dad does. And just because I grew up with my dad as a financial advisor, doesn't mean I had really any leg up on anyone from a knowledge standpoint, I would say. I got insight into his workflow, his work ethic.

But even as I was doing my internship with him, I don't think I understood the difference between a qualified and a non-qualified account. I'm embarrassed to say that, but it just shows how novice I was as far as this world goes.

I definitely had an interest and a flavor for it, always been interested in these kind of topics. But I wouldn't say I was very knowledgeable.

**Caleb Brown:** And was that the role that he was hiring for? I mean, "Hey Taylor, I got an opportunity for you, but you got to come in and get your own clients and do your own thing, I'm not just going to give everything to you."

I mean, because you mentioned the entrepreneur versus the Tesla and the Boeing where you got to work a lot of hours, but you got the cushy salary, you got the stock options, you got the company ... you know all that type of stuff. You're not getting that in a small financial planning firm.

**Taylor Demars:** Yeah, definitely no benefits as far as total compensation package goes. But I feel like the role that dad was looking for

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was ... I've had also a flavor for marketing and trying to find ways to optimize from that standpoint. So, there was value I could add from there.

My grandfather had just retired just less than a few years earlier than I was getting introduced to the firm. So, there was that gap there of it's pretty tough for any single person to manage that amount of clients or assets, so I think there was a natural need.

And he's made it clear, all along that there was an opportunity for me to be introduced in the business, not that it would be given to me.

So, I knew there was an opportunity there. I just kind of left that engagement for last after I had explored other tasks to compare against. Because I knew once I considered this path, I would likely stick to it forever or not at all. And I wanted to be able to compare something, some apples to apples.

**Caleb Brown:** Well, I don't think anybody can say, "Hey, you just sort of coasted ..." I mean, I'm looking at this, if I've got my math right here, I mean, three or four internships is what you rattled off in several different areas. I mean, that's pretty awesome.

I tell my UGA students and all the financial planning people in the profession, like, "If you know you want to be a financial planner and you sign up your freshman year, even if you haven't taken any classes yet, you go try to get a financial planning internship so you can get three or four by the time you graduate."

I mean, you're going to be so far ahead of everybody else. I mean, that's kind of what you did. There were some logistics and supply chain stuff in there, but you also did the Northwestern Mutual, which is really cool and bold.

And then like you said earlier, it positioned you well; one, to help you succeed, but also to kind of squash nepotism. So, that was what? Back in like 2018 or something, is that when you got

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out of school and you started all this? Is that the right timeframe?

**Taylor Demars:** Yeah, and I'll touch on the timeline, but all I'll just echo what you said is, I think my single biggest message to myself, five years or more ago, was just those internships, like you said. It definitely wasn't premeditated, I was just picking up opportunities as they went.

But I'm the oldest of seven siblings, starting college at the middle of college, trying to decide career, et cetera, right now. And that's my continual message to them, is just get intern tips, get exposure, get your hands dirty.

Because I really felt like me getting into those opportunities and working as hard as I could, just helping learn really fast what I did and didn't like. Boeing was a great, big, stable, reputable company, but tons of red tape. Just so much that I felt like my hands are handcuffed and then Tesla was like the exact opposite.

I could do whatever I wanted as long as the job was done, but it was right when the Model 3 was getting out and my job was releasing the Model Y, which wasn't even announced yet. And it was just like the most stressful job I ever had.

I was literally crying every week at my performance reviews because it was just so much pressure, and I decided that wasn't for me. And so, that timeline and as well as the summer sales, it wasn't like an internship, but that was an extremely hard learning process for me too.

I eventually felt like I succeeded, but I also felt like this isn't the lifestyle or career I wanted for me. But I did get a flavor there of the eat what you kill, which I do feel is very enticing for me in this industry, of a harder an advisor works, the better they can perform. Whereas you work at most other 9 to 5 W2 jobs, you get relatively, the same compensation no matter how well you do.



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So, yeah, I echo that, to explore internships. I've had friends, family members that have gone down paths of engineering, finance, medical industry just to pull the plug years into their schooling or education because they finally did an internship and said, "This is not what I signed up for," what they thought they were signing up for.

But going back to your timeline, yeah, I was finishing up at BYU around 2018, and that was the time I really did the internship with dad right before I got married, finished last semester at BYU. He's like, "You got to do an MBA," I said, "Okay."

And I pursued one through an online program through Purdue University and my wife wanted to work at Disney. So, we went to Florida, and I did my MBA just over a year while we were a little bit down there. That was 2019, sunshine and rainbows, and then 2020 hit.

And 2020 was really crazy for a lot of reasons. But the one that impacted me the most was the fact that — we participate in The Church of Jesus Christ of Latter-day Saints and we do missions, the missions we do abroad. And that extends to people my dad's age as well, because he got asked to do a role, what's called a mission president.

And it's a three-year period where he is in charge of all these younger missionaries. And it's not something he asked for or pursued or gets paid to do, but we believe when you're called, you serve.

And so, he got that invitation or calling at the end of 2019 as I was wrapping up my time at Florida. And the original plan was this easy glide path into the industry. I'd slowly ramp up, although first few years you're with clients and then it suddenly went to, "I'm going to be gone next July."

**Caleb Brown:** This is your dad saying this?

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**Taylor Demars:** Yeah, my dad and he ,has this phone call and he has this look on his face, and I was like, “What's going on?” Because we had no backup plan, we had no other advisors, we had a good team, we still have a good team but there was no plan on how are we going to service these clients, the size of the business. And I'm this novice, I know nothing.

But a plan came together pretty quickly. We found another advisor in the industry who had very similar philosophies as us, and just fit in like a glove into our practice. So, he had the CFP and the 20 plus years of experience to fill that gap of dad. But really, it was still divided ... and he still has his own book business.

So, we divided the households and AUM that dad had 50/50 between myself and the other advisor. So, yeah, 2020, I came into the office and got my investment licenses back-to-back and back. And so, I could in time, by the time July 1st hit came around, I was literally rubbered at the road 0 to 60.

And that was extremely scary, but yeah, that's the timeline, I guess, if you will, from the time I did my till in the water with dad to getting my hands fully dirty.

**Caleb Brown:** Wow, that's quite a story, now, I just want to make sure I've got it right. So, here you are, just right out of school, no licenses, you got the MBA done, no CFP at that point.

And you planned on just easing in with your dad, kind of associate planner learning, getting mentored, and then he comes to you and says, “Oh hey, by the way, I'm going to be gone for the next three years. I need you and this other guy that you guys had found to take care of all these clients.” Is that what happened?

**Taylor Demars:** That's what happened, yeah.

**Caleb Brown:** That's amazing to me. I mean, I know you brought the other person in, so you've been there five years now, but how

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did you learn how to do all this stuff? Did you learn from the other advisor because your dad was out of the picture? Or did you just have to make a lot of trial and error? What did you do?

**Taylor Demars:** Great question, I think there was a lot of help all around. I think there was some spiritual help in there. I think the other advisor, his name's Brent, he helped a ton. I think the office staff was very understanding of where I was coming from. So, everybody was just trying to help me get a leg up, but at the end of the day, I had to perform.

I think one of my most vivid memories is, dad was out of the office, and it was middle July, and not to mention COVID and everything else that was going on at that time, the market was crazy. But I got a phone call and the assistant passed over a call to me and they said, "Hey, so-and-so's calling."

It was one of my very top clients and a fear just enveloped me, because I had no idea what he wanted, I had no idea what to do. I was so scared that I fumbled how to transfer the call. I literally ended the call on the client because I didn't even know how to transfer the phone call to my dad's, and so that was embarrassing.

Called him back and he had a super simple question in context, but at the time, it was still scary. But I think that was the biggest thing that helped me, was just like, I have to perform, I just have to figure this out. And so, I think there was a lot of me trying to shadow Brent, the other advisor whenever I could, find other opportunities to be in his appointments.

And every time I met with a client, if I had a question that I didn't understand the answer to, I would be fully transparent and say, "Hey, I don't want to give you back with a knocking answer right now, can I just write this down, get back to you today?"

And I would have this ongoing notepad in front of me and I would just run over to Brent anytime I couldn't figure it out on Investopedia or YouTube or whatever other resources.

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Every week, I would sit down with Brent, I had rescheduled meetings to say, “Can I ask you all these questions” and he would educate me on everything.”

So, he was a huge help to me at getting up to speed. But other than that, it was just a lot of iteration. Because with that many household, there was enough opportunities for me to hear new questions.

**Caleb Brown:** Okay, so Brent wasn't in the meetings with you, so you were just going solo, and you have to kind of ...

**Taylor Demars:** I was solo, yeah.

**Caleb Brown:** You had to have the awareness to say, “Okay, I don't know how to answer this,” that is really tough.

**Taylor Demars:** Yeah, because he had his own book of business to handle, plus the other half, the other 150 households I wasn't managing. So, he has his plate full, but he was generous enough to carve out time for me to have those wild ones with him.

**Caleb Brown:** I'm just curious, what did the clients say when your dad called them or sent this letter and said, “Hey, 350 clients, I'm leaving for three years, we got this new guy coming in and you're going to be working with my son too, who's brand new?” I mean, how did that go?

**Taylor Demars:** That was scary for all of us, I think especially for dad too, because we didn't know what would happen and how clients would receive it. But dad was just very transparent to say, “This isn't something I asked for, I'm not being paid for this, it's a big sacrifice, me and my two kids for three years to Argentina to do this.”

And I think clients, I don't know, I didn't get any initial pushback from them, nor did dad, I believe. I think they just had the mentality of like, “Well, let's see how it goes.”

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And dad at the time said, "I'll be available to meet with clients here and there." Turns out he didn't have the time, he doesn't have the time. He is just so overloaded with what he is doing. He's never really been involved on a face-to-face basis with clients, more in the background.

So, I think clients were very understanding and were very grateful for that. We tried to give them heads up, we sent them videos, we made professional videos of me and Brent, had a videographer interview me, show me doing my hobbies, sent that out to everybody to try and give them a flavor of like, "Here's a jumpstart of who this guy is."

But that's kind of how we warm people up, and I think we made a few enough mistakes but no one left us, fortunately.

**Caleb Brown:** So, here we are five years later, I mean, it sounds like the business is going really well. I mean, what was the biggest challenge? And maybe you already addressed this, I mean, what was the biggest hurdle and the challenge?

I mean, was it like gaining the client's trust now and that actually brings up another question when dad comes back, what are you going to do?

**Taylor Demars:** Sure, yeah, sounds like a three-part question. So, I'll just say so since the time I came in, working full-time after Florida, it's been three years, five years since I did the internship with dad, three years since I've been here full-time. Sorry, I'm trying to go back to your question.

**Caleb Brown:** The biggest challenge, I mean, what was it?

**Taylor Demars:** The biggest challenge would just be me getting over my fear, the imposter syndrome and getting up to speed. From a knowledge standpoint, I feel like I did a good enough job, the clients were satisfied. I wish I could pinpoint a single resource or something that brought me up to speed, but I think it was just a lot of help from everyone.

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Just a lot of dialogue with our assistants, with Brent, online resources, a lot of self-study. And of course, as I started embarking on the CFP education and certification, that filled in a lot of gaps of stuff that I hadn't studied or done before.

As far as next steps, the three-year period is up in July, dad will be back, clients are looking forward to seeing him. But I think they have been happy with what we've done, some of the asked to make sure that they meet with me or Brent going forward. So, I think we've established that trust within as well, which is good to have that diversification of servicing across the business.

Next steps looks more like me buying out portions of the business. So, we're still in the middle of getting evaluation done on a portion of the business, but as of now, the roadmap is to start phasing out portions of dad's book and I'll start phasing in. And that's intimidating of itself because on the surface, it sounds nice to buy into a well-oiled machine, which really is.

And I'm not saying it isn't at all, but it's a significant risk and I think Kitces has written an article or two on this, is just the risk that a new person takes with a seven-figure note for example.

And especially when our primary clientele, our demographic is baby boomers, they're not going to be around forever. So, we're looking at a potential recession on the horizon here about the time we're making those recordings.

So, we have a lot of unknowns, going into purchasing part of the business. The business itself is solid, it's just there's a very different risk to buying and taking out a loan to get in versus building it the ground up. Both have significant risks, pros and cons, but ...

**Caleb Brown:** And what about the other advisor, Brent? I mean, are you guys just going to say, "Okay, hey dad's back, we need the clients back," or are those his now?

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**Taylor Demars:** Good question. All the clients have continued to be on our dad's ownership, if you will, his book of business. We've been more 1099 servicing the business on his behalf. So, yeah, all the household will lump back under his umbrella when he is back, and it'll be a matter of how many go under, in my book from there forward.

Brent was not in our office and our ecosystem before. He joined us, but I think he will continue to be. He's a great asset, he's a great resource in the office, it's great to have around. And I think he benefits from our ecosystem as well. Our assistants, he didn't have office staff before, so I think he just adds to our depth as a team.

**Caleb Brown:** Wow, something similar to this happened to one of my buddies when I came out of Texas Tech a long time ago.

Basically, joined a firm, 300 clients, 350 million, the owner was 60-years-old, my buddy was like 23 or 24, and been there about a year and came to work one day and they're like, oh, someone let them know the boss passed over the weekend, and there was no other advisors.

And it's like, "Oh-oh, what do I do?" And you're 24-years-old. I mean, and kind of had to hold the ship together because everything went to the surviving spouse, and they ended up selling to one of the big aggregators who flew a bunch of senior people down to where he was and got it back on track.

But I mean, you navigated a lot of stuff, I mean, that's tough. I mean, I just can't imagine starting in the business being like, "Okay, well, sorry, not only there's no training wheels, there's no real time for you to learn how to ride this bike, you just have to know how to do it."

**Taylor Demars:** Right, I didn't lead a single review before my dad left. So, it wasn't the way I'd ask to probably start in the business with him, but I think it benefited me a bit long-term.

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**Caleb Brown:** Well, let's talk about that further. Our people, when their back is against the wall, are they going to get to where they want to go quicker versus having an easier glide path?

**Taylor Demars:** I think that's just human nature. I mean, some people are better than me. That they would perform or get up to speed just as fast if they didn't have their back against the wall, and I believe there are those people out there.

But by human nature, I think I would've just accepted the easing slide path, assimilated into the businesses and associate advisor, and there's especially nothing wrong with that.

I think I would've had a more stable and even more in-depth learning had I gone that way, but that just wasn't the option. I just had to just hit the ground running and I think it just came at extensive distress. But I think, zooming out thinking years later, it's worked out and I don't think I would've learned this fast any other way.

**Caleb Brown:** Got it, I'm with you, and that's what I see as well, and I've experienced that personally too. A couple more questions here, then I want you to give us some final tips and closing thoughts. But were you able to retain a majority of the clients?

**Taylor Demars:** Yeah, I would say most definitely. We had some minor attrition here or there, and I think that's normal when you have 350 households, win some, lose some. But I wouldn't say anyone left because they felt like we were not performing at the same level they expected or that they had felt when dad was the sole advisor, just other small miscellaneous stuff.

And in fact, I think we've added more business than there's been by attrition. We've had some significant market fluctuations, obviously between 2020 and '21, '22. But the business has grown from an AUM standpoint and a household standpoint even since dad left. He set some aggressive goals.



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Or at the time it felt aggressive, but he wanted us to add 10 million a year in AUM and I'll have to check my notes to see where we're on by that metric. But yeah, business has definitely thrived more than just survived, I feel.

And I feel like that's more, not just much to my credit, but we've got a great staff, great team, and again, I feel like because of the service my dad's doing, we have some spiritual help as well.

**Caleb Brown:** Well, it sounds like you have good clients too, and I think that's something to be said about that. These people like, "Hey, look, we get it, we understand, maybe not ideal, but we're not going anywhere. We're staying with these guys; we have a good relationship." And I think that's part of it.

I mean, some firms that don't have as good a relationship with their clients, they may have bailed.

So, here's the final question then I'll give you the floor and you already touched on this a little bit. But when dad comes back, who's going to be bossing who around? Who's going to give the orders?

**Taylor Demars:** I still see dad as — he's got the experience, he understands what's going on way more than me. I think I've got my ear closer to the ground since I've been meeting with the clients for the past three years, but it's still his business, I'll have the opportunity to buy into a portion of it, so I'm grateful for that.

Still to be decided how the decision making and so on goes forth in the future years. But we've had opportunities to adopt new technologies, new processes since he's been gone. Things that I've found implemented and he's very much an open book to find new opportunities to add value and grow.

And so, I had no pushback on those, and we were considering other big decisions, other big changes that we're just holding off until he is back because it is his business. I don't feel in any

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way that I can call the shots. So, I think we have a healthy relationship from that standpoint as far as doing decision-making for the sake of the business.

**Caleb Brown:** Final tips for the new planner audience? What would you like to share?

**Taylor Demars:** Sure, I would say that there are two general ways to learn in my opinion. I think one is doing it yourself, and I think the other is leaning on the experience of those that have done it already.

And I think you have to do a bit of both, no one can do your own success for you, but there are so many people, myself included I'm sure, that are willing to give that leg up to those that are potentially listening to this and saying, "Hey, is this a fit for me? And if it is, how do I accelerate my career progression, my earning potential, my learning, et cetera."

I'm an open book because I'm pretty passionate about trying to help people figure that out. And it may not even be that they figure that this is a fit for them and they should try and find any opportunity to confirm that or not, so they can move on to the next step.

So, my tips would be to find mentors. I felt like a big help to me is I found a mentor within the industry when I was first exploring whether to even do the internship with my dad. I just needed an objective opinion, someone who was not my blood relative, because I didn't really know anyone else in the industry.

And so, I found someone, an alumni of my college who was able to give me that objective opinion and mentorship, and I stay connected with them to this day. So, that's my first thought, is try and find mentorship. Try and get that leg up, something that can belay you into the industry.

And my second thought is just as we talked about before, those internships; try and get real world experience on the job. There

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are opportunities for in-person and virtual experience as well. I wish I could say we were hiring right now, but when we are, I'll reach out.

But finally, finding those opportunities to get your hands dirty and really be in front of clients. I think that definitely can replace that wiring and that opportunity. Or any other experience that you might look for in any other industry, just get your hands dirty.

**Caleb Brown:** Thanks for sharing that, we've had Hannah Moore on there, talking about the Amplified Planning Externship, so certainly check that out as well, but any shadow days. I mean, if you're in a small town, USA, and you're home for holiday or the week, call up a local planner.

"Hey, I'm a student CFP program or I'm thinking about getting — can I come just observe you just for a few hours and just watch what's going on." I mean, you'd be surprised on how many planners are open to having somebody do that.

So, well, Taylor, fascinating story. I mean, anything else you'd like to share before we close out?

**Taylor Demars:** No, just touch on two of those points there. I mean, I'm an open book reach out to me, probably easiest for someone to reach out to me via LinkedIn. I check it about once a week and if someone wants to just pick my brain or have some specific questions, I want to be able to help out.

And to your point, Caleb, I think, finding a bit of insight into what someone does, shadowing them, seeing what actually happens ... I've evolved to the point where I'm trying to provide that insight to prospects in particular through a podcast.

It's not live yet, maybe it will be by the time this airs, but I'm calling it Actual Advisor Value because I'm trying to find ways to pull back the curtain and show here's what I did today. Just the

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same way as my son might say, “Hey, what'd you do at work today?”

I'd like to position that in a professional setting to say, “Hey, here's this client, here's the problem they had, here's how I delivered value.” And selfishly, I want potential prospects to see if you hear that and say, “Hey, I'll do that for me.”

But I do think it would be — once this is up and running, something that would be valuable to hopefully listeners on here to say, “What could you actually do?” What you already actually do when you meet with the client, because I feel like that's a mystery for a lot of professions. But I'd love to be able to provide some insight just to say, here's how I made an impact.

**Caleb Brown:** Got it, thanks for sharing that, we'll include that in the show notes. Thanks so much for coming on, great story, Taylor, really appreciate it.

**Taylor Demars:** Yeah, thank you Caleb, appreciate your time.

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