



TAKE FIVE TO MEET CHAMBER MEMBER

*Edward Jones - Financial Advisor:
Colby Bertrand*

Can you please give us a three sentence summary of your personal background?

Born and raised in Salina, I attended Ell-Saline High School and Kansas Wesleyan University for both undergraduate and graduate school. I spent 13 years with EIDorado National Bus prior to starting my own Edward Jones branch office. I enjoy spending time on the sports fields and courts with my family and friends!

What is it about your business that is unique and special?

What separates you from your competitors?

At Edward Jones we are all owners and we believe owners think and act differently from employees. They demonstrate pride and desire to strive for excellence. Our core values say it all; our clients' interest come first and we believe in a quality-oriented, long-term investment philosophy. We separate ourselves apart by partnering with our clients' for the long term and truly valuing that relationship by helping our clients' achieve their dreams financially.

In general, how is demand for your product or service?

Salina is a great market for the serious long-term investor and we strive to become that first choice for those investors. If you value an established process and partnering closely to achieve your financial goals then Edward Jones is the right firm for you.

How long has your firm been in business and why are you operating in Salina region?

I joined Edward Jones as a business owner in November of 2018, but our firm's history is almost 100 years old, we manage over \$1.3 trillion dollars in assets and have over 7 million households served. We are a limited partnership where the owners are the people that work in the branches and home office. We are a small town feel with a large presence that presents great opportunity while still providing personal, one-to-one basis for our clients'. Salina is my choice because I am born and raised here and enjoy raising my family in this community!

What are some of the plans you have for the future of your business?

I strive to help businesses and individuals realize their long-term financial goals and help them build those into a reality by following our established process. Helping our community thrive and prosper is another reason why I choose Edward Jones to be the last career I will pursue.

"We are purpose-built to make our clients' lives stronger" Penny Pennington, Managing Partner

