



## Southwestern Investment Group A New Generation of Financial Advisors

*"This isn't your parents' old-fashioned dictation service."*

**Mobile Assistant's new technology partners with Southwestern Investment Group to create an efficient team of financial advisors.**

Southwestern Investment Group (SWIG), an affiliate of Raymond James, is a team who "works together to improve your financial life." Two of SWIG's up and coming financial advisors have insightful things to say about how Mobile Assistant's dictation service has helped them achieve the goal of becoming more efficient, thereby allowing them to better service their clients and maintain business relationships.

*"Mobile Assistant saves me time because I'm not spending an hour typing notes, and it saves my team now a tremendous amount of time because they're not getting a big voice memo and then having to type that up. In terms of time saved, it's been a complete gamechanger."*

- Drew McMillin



Drew McMillin, CFP, EA, AEP  
Dobyns Wealth Team

One thing that sets SWIG apart from other financial planning firms, according to Drew McMillin, is that "the term comprehensive financial planning gets used a ton in our world, but I think we actually accomplish it. We are neck deep in helping strategize for our clients – taxes, estate planning, estate design. We summarize, strategize, and proactively suggest. I think the depth to which we go is what sets us apart."

Drew is also particularly proud of SWIG's commitment to charitable giving. "We love working with people who care and are passionate about helping causes that they feel passionate about. I want us to be known as a group that does well by helping our clients give

money away – usually the opposite of what financial advisors do – but we enjoy having conversations with clients about when enough is enough, and then show them how they can use that surplus to help causes that they care so deeply about. We love that radical generosity; it's contagious.”



Jackson Wilcox, CPA, CFP  
Deering Wealth Team

Jackson Wilcox has been with SWIG for over two years now. He “knew that he was going to work with numbers,” and studied to become a CPA. In turn though, Jackson notes that “after working in accounting, I decided it wasn’t my favorite industry because you spend a lot of time looking in the rearview mirror rather than looking forward.” With this attitude, Jackson set off to find his niche in the financial advising arena, and then he discovered Mobile Assistant from a colleague.

## The Challenge:



Southwestern Investment Group really focuses on their clients’ past, present, and future financial picture. A challenge that presents itself when dealing with a variety of scenarios is making sure the client feels cared for as an individual and that every detail is noted by the advisor.

*“Before Mobile Assistant, we just had a CRM and you could either type in the notes or use the voice recognition. It was very messy, pretty slow, and it was just not fun. You would leave notes for, like, weeks – but you can’t do that because you start forgetting details.” - Jackson Wilcox*

After beginning a free trial with Mobile Assistant, Jackson notes that “everything was faster and everything was high quality. It basically became a process of figuring out how much time I used to spend typing, and then comparing the cost to having my notes typed for me.”

## The Future:



Continued use of Mobile Assistant's service allows advisors to further hone their workflow process and efficiency and align the whole team into one cohesive working unit.

*"You need to be energized – if you're not, people won't want to work with you. Note taking takes your energy away. Dictating right after your meeting and getting it done actually empowers you." -Jackson Wilcox*

When asked why they would refer others to Mobile Assistant, both advisors agree that the service is well beyond worth the money due to the amount of time it saves them and their team.

*"Mobile Assistant is literally giving me back weeks of time per year. This allows me to be more focused on other important things and talk with my clients more. That's drastically improved my time compared to before having Mobile Assistant." - Drew McMillin*



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