Brokerage: The Commerce Difference

Hi, I'm Jeff Burgess and I am the president of Commerce Brokerage Services.

Commerce Brokerage is a subsidiary of Commerce Bank. We work with our customers to identify their investing goals, their life goals and we help them construct an investment portfolio and an insurance strategy to achieve those goals.

We have a suite of products that allow us to work with any type of investor. Whether it's someone that has short term investment needs or longer term financial goals, we're able to provide the full suite of services to help those individuals achieve their goals.

If someone is trying to figure out if they have enough money for retirement, or if someone is looking to save for their child's education, we're able to work with them to put together an investment strategy and an insurance strategy to achieve their financial goals.

For instance, our flagship product at Commerce Brokerage Services is the Commerce Horizons Investment process. This is a professionally managed account, whereby we leverage the experience and knowledge within the Commerce Trust company, to professionally manage a portfolio for our customers.

This solution has the ability to meet the needs of the most conservative investor all the way up to the investor that has the higher appetite for risk.

Our clients can expect a very personal one-on-one relationship with their Commerce Brokerage financial advisor. This includes one-on-one meetings. This includes many phone conversations. We believe this communication is very necessary to keep the clients abreast of their situation and the progress we're making towards achieving their financial goals.

A financial advisor is a professional that is able to help someone make informed financial decisions. Whether its helping customers understand the complex universe of investment products, insurance products or helping a customer understand when they should invest in the market, or how they should stay in the market during more turbulent times.

Financial advisors can help take the emotion out of the investments and financial decision making process. We believe that there is a four step process to develop the right investment strategy for our clients.

The first step would be meeting to establish this personal relationship with our customers to help them understand their financial goals and needs.

Step two would be working to develop the right recommendation and investment portfolio that we believe will help them achieve those goals.

Step three would be the implementation of that strategy.

Step four is the ongoing communication process whereby we believe it is very important to meet our clients expectations on how they would like to stay abreast to their strategy.

When you package all of this together, we have the unique ability to really be the one-stop-shop for someone's financial services needs. We have a team of experienced professionals that are focused on doing the right thing for their clients.

This means putting the client's interests first, and working to help our client's achieve their financial goals.