



Member of the Month: **Phillis Pilvinis** A Passion for Ethics - The October 2006 NEB Interview

Phillis Pilvinis of PSP and Associates in Surprise, Arizona, is a self-described “preservation specialist.” For years, she has helped retirees protect what they’ve worked their entire lives for. She does this by helping them move “from risk to safety,” Pilvinis says.

Her main marketing approach is conducting workshops on asset preservation. If people like her ideas, she encourages them to set up a free consultation. In that later meeting, she helps people take a look at what they’re trying to accomplish and what their portfolio looks like. She’ll share her thoughts and “if we are on the same page,” she will offer specific product recommendations.

Pilvinis joined NEB about a year ago when the Senior Market Advisor magazine had NEB vet her prior to publishing a profile. A year later, she renewed her membership because she realized the NEB service reinforced her asset preservation strategy.

“Retirees have worked their entire lives,” says Pilvinis. “I feel they should really research whom they are going to work with so they can protect what they’ve achieved. Once clients say they’re interested in a second interview, I encourage them to contact NEB.” She is also planning to distribute NEB’s member brochure to her seminar attendees and to encourage them at that point to contact NEB to verify her background.

Being an NEB member comes naturally to Pilvinis, since a commitment to exemplary ethics has been a feature of her 25-year financial services career. “First and foremost, you have to start from a position of doing the right thing all the time,”

she advises. “You shouldn’t concern yourself with how many prospects you’re converting into clients or how much commission you’re making. If you have the conviction you are doing what’s right, your business will take care of yourself.”

And with that conviction come two other powerful benefits, she says. “You will wake up every day knowing you are helping people. And you will be providing your family with a wonderful income.”

Pilvinis admits there are pressures in the business to deviate from an ethical path. However, she says that “the day I have to stop doing what I believe is right because I’m not going to be compensated or can’t use the right products, will be the day I leave the business.”

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In case you hadn’t noticed, Phillis Pilvinis has a passion for ethics that she is hoping to share as a mentor of producers who want to take their businesses to the next level.

She also hopes to maintain her NEB membership and use it to build her business. Says Pilvinis, “NEB is a wonderful opportunity for clients to research who you are, what your ethics are like, and what you’ve accomplished in your career.”



About the NEB

The National Ethics Bureau™ (NEB) is a membership organization of financial professionals who have successfully passed a comprehensive seven-year background check and have agreed to maintain NEB’s membership standards. All members are admitted into NEB’s national registry, which consumers can access free of charge to verify a member’s background. For more information, call (800) 282-1831 or go to www.ethicscheck.com