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I became a business owner because it gave me a chance to be independent and to have unlimited income potential. I wanted to create a business where clients feel comfortable and welcome while helping them attain their financial goals. I strive to show, as well as educate, my clients that their financial future can be divided into manageable pieces. It is very important to me that I have an educational, non-threatening, and safe place to put all of the pieces of the puzzle together.

I worked full time while putting myself through college. My background in software sales and real estate helped me prepare for having my own business because I was working independently and relied on myself for making an income. I am a very independent woman. I always had an interest in the financial services field. When I realized that I could help a wide variety of people while working with them through different life events, it became clear to me that being a financial advisor was a perfect fit.

I have had inspiration throughout my life. Everyone in my life inspired me in some way to explore this career and my clients continue to inspire me. Helping people define their goals and creating a plan to get them there is inspirational and rewarding. Their dreams are my motivation. Whether their goal is to retire, plan for retirement, provide college educations or insurance needs, I want to partner with them to make this happen for them. They work hard, and I want to help them plan for their future.

I knew that opening my own business would be a challenge, but it still surprised me how much time I would spend to make this happen. Being the decision maker is the best part of being a business owner. I make the decisions on how the business will be built, the best practices for building and keeping clients; being customer focused is my number one priority. Opening your own business is very satisfying; however if I were to give women a piece of advice it would be to talk to women in related fields about what it is like to build a business and to sustain it. The later stages of business ownership require some creativity to keep it fresh and attractive to new clients. I have a passion for educating women and to give them the tools and confidence they need to manage their financial future.

For me, this is an extraordinary opportunity to help clients navigate their financial waters and I take that very seriously. I know they are looking to me for direction and I am there to look at the history as well as the facts.