CAreer spotlight with Devangi Shah

"CAreer spotlight" recognizes and celebrates the client associate role.

CAreer spotlight: Devangi Shah

Title:
Senior Registered Client Associate

Location:
Allentown, PA

Registered?
Yes: 7, 66, Life, Variable, and Health Insurance

CAreer timeline

- Assistant Marketing Manager – Arsi Handmade Paper Export, 1996-1998
- Research Assistant – Motorola, 2000-2001
- Manager and Supervisor – Wells Fargo Auto Finance, 2002-2008
- Client Associate – Wells Fargo Advisors, 2009-present

Fun facts

Favorite book?
Non-fiction – *GRIT* by Angela Duckworth

Fiction – *The Davinci Code* by Dan Brown

Favorite mantra:
Best is yet to come

Three words to describe you:
Tenacious, positive, and efficient

Hobbies:
Reading, travelling, Yoga, nature walks, paint by numbers, volunteering at Hospice

How did you start your career as a client associate?

I'm originally from India. I came to the United States to pursue my master's degree to enhance my business management skills at the encouragement of my dad, having already a bachelor's degree in accounting and statistics. After getting my MBA, I joined Wells Fargo. I managed a team of 40 employees in the Auto Finance Group as a loss prevention manager. Part of the job required to travel often, and while I enjoyed my job, everything changed when my son was born. I wanted flexibility, so I met with my financial advisor back then to see if I could afford to work part-time. Knowing my background, he said there was an opening for a client associate role, and it would allow me to find the work-life balance I was looking for.

I am so lucky that right opportunity appeared when I needed it. I've truly enjoyed the journey of starting at the bottom and learning the basics before getting to where I am now.

Today, I support five financial advisors who have a little over half a billion in assets under management and $3.5 million in revenue.

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What is your favorite part about being a client associate?

Helping the financial advisors I support grow their practice by solidifying client relationship with proactive approach and personalized service.

I also enjoy bringing the team together through team building activities and food. You can find me staying after work, writing notes to leave on my colleagues' desks like "way to go" for positive reinforcement. Some things are not a part of my job, but they are a part of me.

The most fun and creative activity I have created is the quarterly meetings for the financial advisors I support; we brainstorm ideas to help increase revenue and enhance service standards, disseminate important firm initiatives, and discuss industry trends and investment strategies. I even recognize accomplishments. My financial advisors have many different nicknames for me, like "client engagement specialist," "2-POC" (point of contact), and "wonder woman." I believe in paying things forward, and I love to bring that to my team every day.

What has made you stay in your client associate role?

I love my job and every day I feel like I live an amazing blessing. When you love what you do, the people you work with, and your life, your job is just an extension of who you are.

They say you are the sum of five people you associate with — the financial advisors I support are the five people I professionally and proudly associate myself with. They are the most generous, kind, competent, and genuine people in my view. They get full credit for turning my short term, five-year plan into a 13-year plus gratifying career.

I have worked with the same financial advisors since the beginning of my client associate career, so we have built a great rapport with each other. They trust me implicitly and allow me to run the administration side of the business with complete autonomy. They value my opinions, treat me with respect, take time to thank me, and include me in all important decisions. They also recognize and appreciate my diverse background and out of the box thinking that I believe gives us competitive edge.

I believe the financial advisors I support truly care for their clients' financial well-being. It has been a rewarding experience to support them as they work to help clients achieve their financial goals. These financial advisors make me want to stay and compel me to excel at my job.

What do you believe is integral to being a successful client associate?

I believe it's what I call the four Cs of client associate success:

- Communication: Listen to your financial advisors and communicate clearly, hone in on verbal and non-verbal ques. Don't be afraid to ask clarifying questions.
- Curiosity: Embrace your inner curiosity by being open to learning new things in this ever-evolving industry.
- Collaboration: This is key, whether with other client associates, financial advisors, or other departments. You need to have a "we" before "me" approach.
- Consistency: If you follow through consistently with your commitments, then I believe you will be successful.

Being creative and taking initiative is also important. I recognize the value of digital presence and have nudged my financial advisors to sign up for the company's social media program, create LinkedIn profiles, and craft drip marketing strategies.

What is the best career advice you have received?

My family of entrepreneurs always says, "we are what we repeatedly do." That involves smiling, staying curious, being proactive, paying it forward, being grateful, staying humble, and above all being ready to pivot at a moment's notice. I have always thought that was very powerful.

And what advice do you have for others?

Be organized and structured, use the buddy system to avoid trade errors, don't be afraid to ask for help, and be kind to yourself.

Lastly, follow the sunset rule. This means before you leave for the day, clear your work mail and return all your calls. Even if you don't have an update, connect with your clients and financial advisors and tell them you're working on it — staying updated and being honest helps keep the clients happy, which makes the financial advisors happy.

Where do you see yourself in the years ahead?

I believe the best is yet to come for my career! Wells Fargo Advisors has tremendous opportunities. I believe my financial advisors and management team find me valuable and want me to grow with the team. When my son goes off to college, I would like to explore other options to grow professionally, like the Financial Advisor in Training or Branch Manager Leadership Programs.

I believe Wells Fargo Advisors is a great place to work, no matter where one's career path takes them.

Additional fun facts

Favorite part of your work-day routine?

Helping clients, financial advisors, colleagues all day long — making a difference one positive interaction at a time.

When you were a kid, what did you want to be when you grew up?

I wanted to be in business administration and make a meaningful contribution (via education and growth mindset) to make businesses more profitable and efficient.

People might not know…

I have travelled to 32 countries, have studied two years of corporate law, and I am trilingual.

What Senior Financial Advisor Martin Kovach said about working with Devangi

Devangi always looks to understand the needs of the business, the client, and me the financial advisors. She truly cares about me, my clients, and other employees. She is always looking to do her job better and have me do my job better because she feels the client and Wells Fargo Advisors will benefit more. Devangi has impacted my business tremendously, and I believe I would not be at this level of production without her. I truly believe my business can get to a higher level because of her. Devangi also brings a ton of positive energy and enthusiasm to the job, has a great personality, and brings a smile and fun/happy attitude with her at all times.