

# Diverse

## BY DESIGN

Written by Marie Meyer · Photo provided by Northwestern Mutual Cincinnati

When Jacki Purcell took an internship position with Northwestern Mutual – Orlando in 2010, she knew she was starting a job where she would help people build wealth, protect their wealth, plan and pursue their passions. What she didn't know was she was starting a career where she had the ability to change a community.

Since 2010, Jacki has continued to defy the odds. She's excelled in a challenging business in which women make up only 31 percent\* of financial advisors nationally. In spite of the odds, Jacki achieved early success as the number two intern in the Southeast U.S., followed by a very successful first year establishing her financial planning practice.

There seemed to be distinct populations who were underrepresented in the field of financial planning; as well as groups that are underserved, such as minorities and women. The more she looked into her observations the more she learned that it wasn't merely a hunch; there is a huge need for diversity in the field and planning for diverse populations.

Just after her first year in the business, Jacki attended a training in Milwaukee for financial representatives who were off to a fast start. There she met Cincinnati-native Joel Purcell, her now husband. While it may sound like a straightforward love story, it was anything but. Not only did Joel and Jacki have to contend with a long-distance relationship, they also had to contend with where to live. Both financial advisors with established independent practices, they had their own clients, in different cities and in different parts of the country.

After some deliberation and some relationship negotiation, Jacki decided to leave sunny Florida behind and make the move to Cincinnati. She was able to maintain her Florida-based clients but faced a new challenge – building her career in Cincinnati, a city where she had virtually no contacts other than her new husband who was essentially competition.

After three tough years building a presence in Cincinnati, Jacki's hard work and ability to inspire those around her has paid off. In September 2015, she was named the managing director of Northwestern Mutual – Downtown Cincinnati. While her husband Joel and she have combined practices and now serve more than 500 families both locally and nationally, her new role comes with a new set of challenges. She is responsible for recruiting, developing and assisting young advisors as they pursue Northwestern Mutual – Cincinnati's mission of creating the most financially secure region in America.

As Jacki quickly assimilated to her new role, she noticed a few trends. Primarily, there seemed to be distinct populations who were underrepresented in the field of financial planning; as well as groups that are underserved, such as minorities and women. The more she looked into her observations, the more she learned that it wasn't merely a hunch; there is a huge need for diversity in the field of financial planning. Jacki set out to pursue her personal mission – building the most diverse financial planning practice in the country.

In just under a year in her new role, she has doubled the size of her team, adding financial representatives focused on diverse populations including African American, Asian and Middle Eastern individuals, families and business owners. While Jacki is a firm believer in the power of full picture financial planning to achieve financial security, she is also focused on giving back to the community at large and organizes regular outreach events where her team takes time away from the office to give back to organizations such as City Gospel Mission, Freestore Foodbank and Ronald McDonald House. ❖

\*2015 US Bureau of Labor Statistics

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Emerald Sparks, Jesse Terbrueggen, Jacki Purcell, Fadi Alhammuri and Josh Keeling.