



Turning Points

By: Alex Bayer



Lori Van Dusen

- Lori's inspiration was her grandfather growing up
- Her turning point was after graduating she wanted to be a singer but after being rejected she applied to go to a liberal arts college where she could learn what else she liked before making up her mind about what career to embark upon.
- Lori decided to follow in her grandfather's footsteps and enter the financial services field.

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- She discovered that she was the only financial advisor who was a woman in the entire office, as well as the youngest.
- Today Lori is recognized as one of the top financial advisors in the nation.

About the company

- Convergent wealth was founded in 1994
- Their main focus is to provide clients with objective, holistic wealth management services.
- They are the first to provide consolidated performance reporting, keeping the clients in the loop without tying up their valuable time.
- Today they are worth over \$14 billion in assets

Famous Quote

- “Pain is temporary, quitting is forever.”-Lance Armstrong
- This reflects Lori because she overcame all of her obstacles and never quit and that is why she is where she is today.

Rick Dorschel

- Dorschel is a very successful automotive dealership that succeeds in used car sales as well as new car sales.
- Rick is a very determined individual
- He strives to overcome any obstacle and has a very positive outlook
- Rick believes that expertise is not a necessity but if you have greater determination and strive for success at that position, then you will be more successful than even an expert.

Dorschel's Philosophy

- **One person.**
Your salesperson is trained to handle your transaction from beginning to end.
- **Quick and painless.**
Customers can take delivery of your vehicle within 45 minutes from walking in the door.
- **Competitive prices.**
They have researched the marketplace and determined the fair market value of the vehicle. This means one price for everyone.
- **Clear and simple payment options.**
Whether you buy, lease, or finance your vehicle, clear payment options are presented to you.
- **Clearly posted rates.**
They have researched local banks and credit unions and clearly post daily rates and consistent terms.
- **Involvement in trade-in process.**
Customers are welcome to drive along with the appraiser to discuss details about your car which may factor into determining its trade-in value.

Turning Point

- Rick's turning point was when he chose to take his determination for the family business a step further and prove himself to his father by getting a position at a competing dealership.
- This made Rick's father see exactly how determined he was and his father eventually allowed him to purchase the family dealership.

Important Quote

- "In the swim of life, you can either decide to spend your time in the shallow end, or go out to the ocean." Christopher Reeve
- This quote describes Rick Dorschel because Rick chose to take risks and create an effective business without being timid with his choices.