

Gill South

Striking the *balance*

Top of the Table achiever Corey Williams has working smart as a top priority.

Success in cycling, leading to schoolboy and under 21 national titles has led to a career of going the extra mile in everything he does for Corey Williams, a partner and major shareholder at Swain Woodham Group in Christchurch, where he specialises in life insurance.

Williams, who is a member of the American-based organisation for financial professionals, Million Dollar Round Table (MDRT), and is in the organisation's Top of the Table group of high earners, has been chosen as the first New Zealander to do a talk at the 2019 Top of the Table conference to be held in Austin, Texas in September.

The business life insurance specialist will be talking to the audience who will have travelled from 68 countries, about his routines before and after work which he said give him energy and balance in his life.

He is borrowing the word "blissipline" to help describe his regime of early rising, meditation, exercise, breakfast with his young twin girls and putting his electronic communication on "do not disturb" until after 8am.

MDRT, although it recognises successful earners, is also interested in the whole person and in hearing how members are creating balance in their lives, how they are giving back and doing work for the community, said the financial adviser. It also looks at advisers' ethics when accepting people as members and taking them through

the qualifications, said Williams.

The organisation sees these things outside of work as being helpful in giving high performers the focus to go to the next level of success.

"The biggest thing I've got out of it is how to do less, to do more," said Williams, who has been a member of MDRT for seven years. "Over time, by doing less, I've created more. I feel I have had more time off and a better lifestyle personally from my association with MDRT," he said.

Thanks to his regime, which can't be revealed in detail because of the upcoming Top of the Table talk, he is more refreshed the following morning he said. The audience will be encouraged to take on some of the ideas of the Timaru-born businessman.

The financial adviser said he sees people who don't have rituals become too engaged with work and, as a consequence, become disengaged with reality.

As well as running his life insurance business which includes a big customer base of group medical clients, Williams also has two other separate business interests at the moment. One is a tech business and the other is an outsourced business operating from South Africa.

Until two years ago he had a cycling business, which had a specialty training tool that measured power and force. He is likely to keep his eyes open for other business ideas, his work giving him good contacts for this.

Williams, who has always been an entrepreneurial thinker, never even considering going to university, and fell, like many others, into being a financial adviser after an impressive business career. This started with being a bank teller straight out of school, then rising to head bank teller in

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Timaru. He was then working on projects for the bank in Wellington and due to hard work and being in the right place at the right time, he was recognised by ANZ as a good person to have on the Melbourne team when it was redesigning and condensing its withdrawal process across the bank.

When he went to the UK on his OE in his mid-twenties, he didn't get a job in a pub as many Kiwis do, but set up a sales and marketing company. Williams approached the big food retailers and others, working with Sainsbury's, Tesco and Homebase to help them promote the new financial products they were in the throes of launching. He also worked with one of the Manchester football clubs to help them promote their new financial suite.

"At that time their staff were averaging one new product a week, but they didn't have training or expertise, they didn't understand the why," said Williams.

Before long, Williams, who was in the UK from 2001 to 2007 - and his team of 40, went



Brian Burgess, second left, Corey Williams far right, and other MDRT members helping with registration at 2017 Orlando MDRT conference.



Above: Corey Williams, Bill McDermott, CEO of SAP, the software market leader, and Brian Burgess, director of SwainWoodham Group and South Island chair of MDRT New Zealand.

from promoting these companies' financial products to helping these organisations develop their product suite in the first place so it was better aligned with their customers' needs.

Williams will admit, like many, that he fell into being a financial adviser, there was no real reason. He came to Swain Woodham through his mother, Sharyn Coleville, who had been the office manager at the Christchurch firm for years and is retiring at the end of this financial year.

He was given a bit of freedom, taking four months out to help set up a base for the New Zealand Olympic cycling team in Belgium in the run up to the London Olympics in 2012.

With a commitment to high performance and continuous improvement in his life insurance business at Swain Woodham, Williams' clients are group medical schemes, business owners, CEOs and families. Whenever he can, said Williams, he has a strong pull towards technology and he will use it to join the dots in his business.

With new regulation coming to the financial advisory sector, the company's strategy is to be ahead of it and, once it knows the lay of the land, to combine as robust a system as possible, said Williams.

For the adviser, when he was starting out, it was the first couple of claims which truly hit home to him that he would be making a difference in people's lives.

"It's about the journey you go on with people, being there, whatever the challenges are and being able to be quite frank, and at times, brutally honest, to help them navigate through those."

With life insurance, helping people as they go through a claim is where the "rubber meets the road" and you are giving true independent advice, said Williams. "I am there with them every step of the way, whether they are bringing someone new into the family or there is a marriage break up. We make sure that we are there

to support them, doing everything we can."

The high performer enjoys the feedback he receives about group medical schemes, that they give a feel good factor to staff.

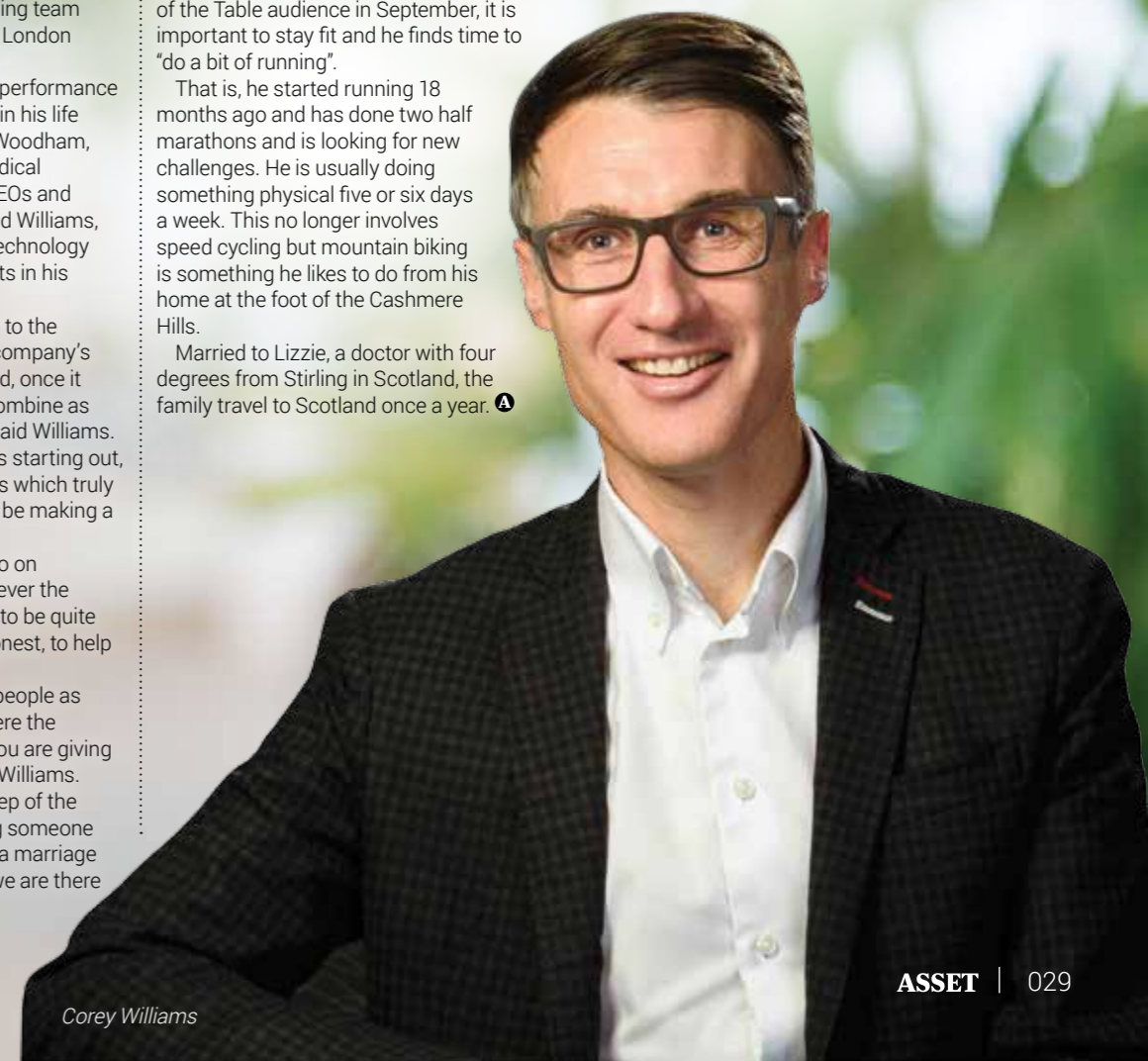
"You have a healthier, happier workforce, he said. He also finds when a company is trying to attract a new hire, the importance of the company having a medical policy often outstrips the salary.

"It sends the message that the company is a caring, kind workplace," said Williams, who is married to a GP.

As he will be telling his international Top of the Table audience in September, it is important to stay fit and he finds time to "do a bit of running".

That is, he started running 18 months ago and has done two half marathons and is looking for new challenges. He is usually doing something physical five or six days a week. This no longer involves speed cycling but mountain biking is something he likes to do from his home at the foot of the Cashmere Hills.

Married to Lizzie, a doctor with four degrees from Stirling in Scotland, the family travel to Scotland once a year. **A**



Corey Williams