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Integrity the Foundation for Success at The Annuity Source, Inc.

When Margo Thompson followed her father into the financial services business, she never envisioned that 25 years later she'd run her own company and be an industry leader. But thanks to his strong influence, that's exactly what happened for the Principal of The Annuity Source, Inc. Although Thompson had her father as a mentor for only a short time before he passed away, his impact lives on in the business practices at Thompson's company.

"My father taught me that being honest and ethical was the only way to build successful relationships," says Thompson. "I learned the right way to operate a business. It was obvious that others around him respected his ethics in the business environment."

Caring for her clients and the ultimate investor remains at the core of Thompson's business practices. With offices on both coasts, The Annuity Source, Inc. serves financial planners, insurance agents and advisers nationwide, helping them find the best products to serve their customers' specific needs.

"Our talent is being able to scour the market for just that right product," Thompson says. "We want to make advisers look like heroes to their investors."

As an Independently Owned Marketing Organization, The Annuity Source, Inc. stays on the leading edge of the industry to ensure it's offering the most up-to-date products and finding tailored solutions for advisers and their customers.



The Annuity Source, Inc. serves financial planners, insurance agents and advisers nationwide, helping them find the best products to serve their customers' specific needs. Seated, from left: Courtney Juhl, Margo Thompson and Heather Hutchinson. Standing: Laura Wattles, Emily Pierson and Georgette Duleba.

"We stay connected with every new annuity and life product that hits the market," Thompson says. "We make sure every company with a competitive product is in our lineup."

"Our No. 1 goal is to do what's best for the customer and for their investor."

– Margo Thompson, Principal
The Annuity Source, Inc.

Thompson sits on several advisory councils for major insurance companies and is the chairperson for the IMAC Committee of the National Association of Fixed Annuities. Those activities keep Thompson at the heart of the

industry's pulse, aware of the needs of the consumer and of the perspective of the product manufacturers.

Staying plugged in is critical in a field where the landscape changes daily. But Thompson knows some things are even more important to success: the values she learned from her father about putting customers first and doing the right thing.

"Our team of experts is dedicated to excellence, where the client always comes first," Thompson says. "We're going to focus our efforts to make sure we meet their needs. We put ideas together that allow the adviser to take care of the customer's needs, which helps them to feel at ease in retirement."



11400 SE 8th Street, Suite 430 | Bellevue, WA 98004
425-453-1020 | 800-743-4930 (toll-free)
Info@TheAnnuitySourceInc.com | www.theannuitysourceinc.com