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Spencer Financial, LLC Named “Practice of the Year” by Signator Investors for 2013

February 5, 2014 – Spencer Financial, LLC, a financial advisory firm based in historic Sudbury, MA, led by Managing Partner W. Thomas Spencer Jr, was named “Practice of the Year” by Signator Investors, Inc., powered by John Hancock Financial Network. This national competition recognizes and rewards excellence in business management, and is the pre-eminent measure of accomplishment within Signator Investors.

“I am very pleased to recognize the team at Spencer Financial as the 2013 Practice of the Year winner,” said Brian Heapps, president of John Hancock Financial Network. “I congratulate them on creating an atmosphere of ‘Planning Made Personal’ and going above and beyond in helping their clients achieve their goals.”

Spencer Financial's Tom Spencer, credits his partners, Sam Baldwin and Bill Spencer for bringing specialized expertise to their financial advisory firm. This experience along with the use of advanced technologies allows the firm to offer a sophisticated yet personal community based alternative to large institutional providers. Clients of Spencer Financial develop a relationship with the firm rather than with an individual advisor so there are always multiple points of contact. A disciplined financial modeling process is used to help clients with clarity and confidence with regard to their pre and post retirement reality. The firm offers access, to an extensive universe of investments, insurance solutions and financial management strategies.

The award is made possible in part due to a relationship with National Financial®, the correspondent clearing business unit of Fidelity Investments®. As part of the selection process for the award, Spencer Financial, an affiliate of Boston Partners Financial Group, LLC, underwent a rigorous assessment conducted by international management consulting firm Business Health. Business Health reviewed all applicants' client management, internal planning and structure, external relations, staffing and technology capabilities, and overall practice performance.

"National Financial is proud to be associated with the Signator Investors, Inc. Practice of the Year award," said Sanjiv Mirchandani, president of National Financial. "A competition that rewards excellence in practice management and client service is recognizing the values that can help drive the future of the advice business. We should all pay attention to leaders in this area."

“It was a privilege for Business Health to have been involved in the Practice of the Year Competition again in 2013,” said Ray Henderson, Partner at Business Health. “The quality of the finalists was outstanding. Spencer Financial, LLC is a worthy winner of the 2013 award. The firm has been a finalist each year since the inception of the award, and it is a credit to Tom and his team that the quality of their business and processes has continued to be improved and refined. Spencer Financial ranks amongst the top practices we have seen in the U.S. and in the other countries where we work,” said Henderson.