

Tom Rock Case Study

A Productive Partnership for Business Efficiency and Financial Advisory

Challenge

Tom Rock is a successful business owner and McDonald's franchisee. As a focused and time-oriented individual, owning a business came second nature to him. Tom began his search for a new financial professional to work with in 2003, after his trusted financial advisor encountered health issues that led to his retirement, and Sparkmon appeared prominently in his investigations. "They were doing the work for many restaurants and operators," says Tom. When another operator and McDonald's both recommended Sparkmon, Tom decided to reach out. "Their experience with McDonald's is what really made me feel confident with them."

Solution

Though Tom's franchises are in Virginia, the distance from Sparkmon's office proved no difficulty at all. Richard traveled to meet with Tom personally, learned about his needs and goals and advised him on reorganizing and consolidating. He immediately saw the positive effect, saying, "That's one of the things that is really valuable: they can advise and counsel on what's been tried and what works for other people." Tom appreciated Sparkmon's dedication to pro-active advice, their prompt phone calls and emails, and their willingness to assist the rest of his company as well as himself. Working closely with the firm, Tom completely reorganized his business and eliminated all duplication of efforts, improving his business operations significantly.

Result

For the last thirteen years, Tom has continued to see positive results and remains thrilled with his experience working with Sparkmon, as well as the services the firm provides. The tradition of excellence is carried in the high caliber of professionals Sparkmon maintains, observes Tom. He particularly appreciates the fact that the firm is extremely efficient, noting that they bring a team of financial advisors' wealth of knowledge to every interaction. He is also deeply appreciative of their referral system, saying, "For areas that aren't their specialty, they can recommend us to other professionals. I would never have found my ACA person if it weren't for them." When the subject of financial professionals comes up, Tom is quick to highly recommend Sparkmon to other business owners.

Testimonial

"If everyone I had to deal with was as wonderful and competent as Richard and the people over at Sparkmon, the world would be a better place. I mean that sincerely."