



In the News

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Driven to Succeed



Michael Kusick, CFP®, CEO and Managing Principal of Investmark Advisory Services in Stratford CT didn't set out to focus on automobile dealers. But in 2010, a client who owned a dealership needed assistance with a financial problem. Michael helped him, and the client was so impressed that he started recommending Michael to other car-dealers.

One service Michael provides for these clients is investing the premiums for all the extended warranties (Reinsurance) that are sold through the dealership's finance and insurance departments. When car dealers sell extended warranties, undercoating or window etching, for example, they receive up-front premiums to cover a service need that is easily four to five years down the road, if it ever occurs. The problem is what to do with all the money that is set aside to pay these potential reinsurance claims and Michael offers the solution through Investmark's ReInsurance Max asset management program.

By learning all he could about car dealers, Michael slowly built his niche into an important program for automotive retailers. He is a member of the Connecticut Automotive Retailer's Association (CAR) and, in many cases, is also helping dealership owners with other services including retirement plans, insurance and personal wealth management.

Michael is a great example of how specializing in a unique niche market can help grow your business and provide truly meaningful, valuable services to new clients.

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