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CREATIVE STRATEGIES AND BUSINESS ADVICE FOR INSURANCE AND FINANCIAL ADVISORS

FOUR UNDER FORTY



The fast track to success

- 30 Life insurance as an asset
- 46 NAIFA kicks off 125th anniversary celebrations
- 50 Serving the middle market

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FOUR UNDER FORTY

A quick look at these four outstanding NAIFA members will explain why they have earned the right to join the ranks of the **Four Under Forty**.

The fast track to success

TAYLOR SLEDGE



The Fast Track to Success

Sledge's meteoric rise to the top is due mainly to his penchant for helping others.

By Nick Fortuna

When Taylor M. Sledge was fresh out of college, he wasn't sure that a career as a financial advisor was right for him. Forward seven years to the MDRT Experience Meeting last February in Malaysia, and there is no doubt that Sledge has truly found his calling.

In his first international speaking engagement, Sledge, 29, delivered a motivational speech to more than 6,000 attendees, detailing how to start a financial-services practice in today's highly competitive environment. He is the founder and chairman of Madison, Miss.-based Sledge & Co., which specializes in business planning and succession, estate planning and financial services. He and his team of four employees operate with the motto, "Ask, Listen, Create." They believe that if you ask the right questions of clients and listen carefully to their concerns and goals, you will create the right financial plan for them.

Sledge says his company, which serves clients in 17 states, doesn't pre-qualify clients based on their wealth, but typically serves business owners, entrepreneurs, executives and professionals. His objective each day is simple: Make two appointments with potential clients. "I don't care if they're worth

one dollar or 1 billion dollars, we just want to build a relationship with them," he says. "I like to say that our clients are enterprising, hardworking people who believe that tomorrow will be better than today."

Like his clients, Sledge's career does seem to get better with each passing day. He was the New

York Life Rookie of the Year in 2007, its New Associate of the Year in 2008, a member of its Executive Council in 2008-10, its President's Council in 2011, and its Chairman's Council each year since 2012. He's also been an MDRT member each year since 2008 and is a qualifying member of the Court of the Table.





"I like to say that our clients are enterprising, hardworking people who believe that tomorrow will be better than today."

Sledge was New York Life's leading long-term-care insurance producer in Mississippi from 2007-12, the life-insurance production leader for its Mississippi General Office from 2011-2013 and became New York Life's youngest Mississippi Associate of the Year in 2011, when he won the first of three consecutive such awards. He's also a member of the Nautilus Group, which serves approximately 200 advisors nationwide.

Hesitant beginnings

Given his success in the industry, you might think that Sledge is a natural, but he wasn't always convinced of that himself. After graduating from the University of Mississippi in 2007, he first considered becoming a financial advisor at the suggestion of his grandfather, C.B. Sledge, who had spent his career selling group life insurance.

At first, the younger Sledge was slow to warm to his new career because he felt that by seeking new clients, he was being a nuisance to people—just another pushy salesman trying to move a product. But he soon had several rewarding experiences that changed his outlook and the trajectory of his career.

First, Sledge presented a widow with a life insurance death claim and saw her cry as she accepted the checks, relieved that she wouldn't have to worry about her financial future. And shortly thereafter, several new clients took a chance on a fresh-faced advisor with a light résumé but an optimistic outlook, and he delivered the results he had promised.

"That's when I realized that this business is not only a way to make a living but an opportunity to really help people and do something

positive for them, as well," Sledge says. "I love having the opportunity to interact with people who I care about and offer them something that I know will help them and make a difference in their lives. Our company has been built around relationships, and interacting with people is just something that comes naturally to me. I love being able to do that for a living every day."

When he's away from the office, Sledge spends time with his wife, Dr. Catherine Sledge, the owner of Carter Sledge Family Dentistry in Ridgeland, Miss. The couple has a 2-year-old son, Taylor M. Sledge III, nicknamed "T. Mark," and was expecting a second son in August.

Sledge is an avid hunter and fisherman; is active in First Baptist Church of Jackson, and the Fellowship of Christian Athletes and Mission First Inner City Ministry. He is also a member of the Phoenix Club of Jackson, which raises funds for the Boys and Girls Club of Central Mississippi, and enjoys literature and music, especially going to concerts. He even plays the harmonica and sings in the MDRT band, Roundabout.

Sledge serves on the executive committee of the Jackson chapter of NAIFA, where he is president-elect. "I'm a big believer in being involved in the industry," he says. "The reason NAIFA is so rewarding is that not only does it provide a voice for our clients' financial needs on Capitol Hill, it's also a place where we can enjoy one of the greatest things that this business has to offer—camaraderie. I believe in learning from the greats, and some of the best ideas that I've learned to help my clients have come from spending time with people who are successful in this business." [at](#)

