

“Knowing where I am and what I need to run my business is top priority”

Bio

Owner and operator of a logistics company in Long Plain, MB. Located 24 minutes southwest of Portage la Prairie his company is responsible for shipping goods and services for the reserve and surrounding area. He employs people in the community that work both in the warehouse and as delivery personal. Constantly on the move and helping out the community when he can.

Influences

- Community businesses
- Financial news
- Current news and events in the community

Frustrations

- Slow connections working remotely
- Potential slow feedback on current business health and holdings
- Flexibility to contact advisor if needs arise like credit lines

Technology Proficiency

- Low to Moderate User
- Preferred choices: Laptop or Mobile App

Goals

- Business owner for the past 10 years
- Constant need to know about daily finances for business operations to maintain cost and payroll for staff
- Always on the move and rarely stays at the office, so mobile access is important and need to be alerted if there are any issue with finance immediately.

Sam Williams

Marital Status: Married
Age: 43 years old
Location: Long Plain, MB
Occupation: Business Owner