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# Transforming stories

Author Lisa Lipkin has collected stories from 21 Aegon employees in Hungary, the United Kingdom, the Netherlands and the United States to find out how staff help customers ‘transform tomorrow’. She discovered that customers often transform us

**A**SKED IF A SINGLE theme unites the interviews in her book *We are Aegon*, Lisa says without hesitation: “Compassion. It was the common thread running throughout every interview. Each employee I spoke with expressed their sense of purpose in their jobs in many ways, whether by hand delivering an urgently needed statement to a customer; by sharing their own experience of illness to a cancer patient; or taking the time to listen to an elderly woman simply because they knew she had no one else to talk to. When the interviewees opened up to me and shared their stories, they enabled something very special and inspiring to happen.” We publish here

the abridged versions of three of Lisa’s stories.

### WORLDS APART

Mark Jordan, Retirement Planning Consultant with Transamerica Retirement Solutions, Saint Paul, Minnesota, makes a 16-hour drive from Minnesota every other month to visit his parents in his hometown of Jackson, Mississippi. Between visits, he calls them three times a week. “It’s a Southern thing,” he says.

Family ties run deep in this part of the world, as do other things, according to Mark, like segregation, poverty and fatalism.

“Mississippi today is not that far removed from the 1960s. I went all the way through high school having never sat in a class with somebody other than

Afro American students. And I graduated in 1994!”

Mark says that, though his parents worked, they were poor. At times their evening meal was nothing but tomato sandwiches.

“I was my parents’ hope. People from their generation rarely graduated from high school. So when I came on board as a retirement planning consultant with Transamerica in 2010, I brought a unique worldview. At that time Transamerica wasn’t getting traction in a chain of



### RÉSUMÉ

Lisa Lipkin is a professional storyteller and founder of storystrategies.net, a consultancy that helps companies discover and share their best stories. She is the author of *Bringing the Story Home: The Complete Guide to Storytelling*.

## Family ties run deep in this part of the world



hospital contracts in Mississippi. I saw right away what the problem was: 70% of the hospital workforce was a minority whereas the 5% in upper management, who were asking them to contribute to their retirement plans, were white.

“They had no history of saving for retirement, they didn’t trust white-collar workers. So I told them, ‘You say you can’t afford to save, but you spent at least \$25 on your nails, \$35 on that haircut and \$55 on those shoes. You can spend today and have nothing when you need it later, or you can do something about it.’ Since I got here four years ago, enrollment has gone up to 80%.”

“I love my job. It’s great to talk to a CEO or a doctor about their retirement plans, but my real drive comes from working in underserved areas for people who will never be able to retire without saving. They are the people I’m here for.”

#### THE ART OF THE STRUDEL

Anikó Körösi, Financial Advisor, Hungary, makes a mean strudel. According to her, it’s no easy feat. You need a big table and you must use special strudel flour. You need to know how to work the pastry just so, and slowly massage it so it becomes paper-thin. You might need to wait a whole day before filling it with fruit and baking it. It takes patience, experience and love, skills she brings to her work.

“I develop a personal relationship with my clients. We

drink coffee, talk about life. They are like family to me. Yesterday, I took the son of one of my clients to a farm near Budapest. He is like a second child to me. In 2007, I sold a life insurance policy to his father, a young, healthy man, 32 years old at that time. He had a loan of 10,000,000 forints (approx. \$36,000) and he needed insurance to make sure the loan would be repaid if something happened to him. Two years later he died very unexpectedly of cancer. If he hadn’t had the policy his wife would not have been able to repay the loan. She was so grateful, and she remains a dear friend today.”

According to Anikó, Hungarians are very hardened to life. “If people have a car, they buy third-party liability insurance because it’s compulsory. If they

## “My husband had a stroke and needs 24-hour care”

have a home, they buy home insurance. They don’t buy life insurance or pension insurance because they say: ‘I won’t live long enough to enjoy it, so why should I buy it?’”

Says Anikó: “Sadly, because I’ve been working as an insurance advisor for 21 years, quite a number of my clients have died, and I share my own story. Unfortunately my husband had a stroke and he needs round-the-clock care. If he didn’t have life insurance our lives would have changed even more dramatically. I know how much it costs if