

Corey Metz



# Persistence Pays Off

Corey Metz has built a thriving practice by being highly organized and focused on helping others.

The lure of being in control of your work life can be a very strong career aphrodisiac for someone just out of college. Add to that the possibility of shaping your own salary, and you have an irresistible combination. At least it was for Corey Metz, CLU, of Metz Insurance & Financial.

He moved straight into the insurance industry after graduating from Tulane University with a degree in finance. A family friend who worked with New York Life convinced him to try the sales side of the business. Metz was game. “Being able to control my own destiny felt like the right fit,” he says. It turned out to be a good move. He turned down a \$27,000-a-year job offer elsewhere, and ended up making \$59,000 that first year as an agent.

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—Corey Metz

Metz, however, was not immune to the start-up doldrums that confront new agents in those early years. During his second year, his income fell to \$49,000, and then to \$39,000 the following year, as he struggled to build his business.

But by his own admission, he is nothing if not persistent. He stuck with the business, and drew on his seemingly endless reserves of motivation to kick his business into high gear. “I’ve always been a people person and when you have a lot of connections, it’s conducive to this business,” he says.

He honed his skills and two years later, at just 27 years old, Metz saw his income cross the \$100,000 mark. He then knew that he was on the right track for building his business into the success it is today. Four MDRT Court of the Table qualifications and a Top of the Table qualification in 2010, as well as being named one of New York Life’s top 100 producers, are just several of the signs that his success continues on its upward trajectory.





### A simple recipe for success

Metz, 38, is very clear about what he needs to do to succeed. “Consistency and persistence lead to activity, which creates the basis for success,” he says. “When you are consistent

in your approach and persistent in your resolve, you’ll have success.”

addition, he plans his work in 90-day cycles, so he is sure to take a get-away trip once a quarter to “recharge and revitalize,” he says.

And among all the charity work that he and his wife, Julie, are involved in, Metz highlights the family charity they run at their local temple, which sends 9th and 10th graders to Washington, D.C., for educational and social justice efforts for Israel.

Metz credits his NAIFA membership with supporting his learning during the early years in the business. He subsequently gave back to the organization by serving on the board of NAIFA-Dallas for two years. Now, he says, the focus of his membership has shifted. “NAIFA allows you to get involved in the legislative affairs of our business,” he says, which have become increasingly important as he grows his business. □

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During those early years in his newly adopted Dallas, persistence meant building relationships with attorneys he met through his only Dallas-based connection—a cousin. It meant using call lists and reaching out to new moms and getting meetings set up. It meant being very organized and working until 10 p.m. three or four nights a week.

From that start, Metz widened his reach to small-business owners. He became involved in Entrepreneurs’ Organization, and was a sponsor of the group in Dallas for five years. The group consisted of about 150 small-business owners. “I developed a lot of clients from that group—and a lot of good relationships that are ongoing and fruitful,” he says. In addition to this niche, he works with high-income professionals in real estate and investment banking.

Success is also about being outward focused. “Helping people is key,” says Metz. “If you help people, you end up gaining clients.”

### Keeping it real

All this hard work has paid off, and now Metz is able to work a consistent 8 a.m. to 6 p.m. schedule, and is the one to drop daughters Olivia, 9, and Scarlett, 6, off at school each morning. He continues to work one or two nights a week, but that is balanced by the generous vacation and travel schedule he and his family have. The month of August is, in effect, dedicated to his family and taking a mental break from working with clients. He adds to that a week off in spring, as well as travel each December. In

### Metz’s Best Practices

- » Metz’s mantra is ABP—always be prospecting. You never know where you’re going to meet good people who can become clients.
- » Be persistent in calling people. You need to make phone calls to generate activity.
- » Pay attention to activity and volume. Keep a weekly list of your calls, appointments, referrals and sales. It’s important to verify and quantify—to track what you do for a living.
- » Be organized. Plan your days and months ahead, and leave your desk clean at night.

Photography by Caroline Mueller Photography

