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Report: #412338

## Report: Blue Coast Financial

Reported By: (charlottesville Virginia)

**INVESTIGATION:** Shawn Hull, Blue Coast Financial Commitment to 100% client satisfaction, Feel confident and secure when doing business with Blue Coast. Verified by Rip-off Report Corporate Advocacy Business Remediation and customer satisfaction program. Texas Nationwide

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**Blue Coast Financial**  
 Bluecoastfinancial.com  
 Nationwide Texas  
 United States of America  
 Phone: 800-467-2310  
 Web Address:

**Category:** Business Consulting

**Submitted:** Thursday, January 15, 2009  
 Posted: Friday, April 09, 2010

[Rip-off Report Investigation:](#)

Investigation: Positive Rating and Recognition has been given to Blue Coast Financial for its Commitment to Excellence in [customer service](#). Feel confident and secure when doing business with Blue Coast, verified by Rip-off Report Corporate Advocacy Business Remediation and [customer satisfaction](#) program.

Editor's UPDATE: Positive Rating and Recognition has been given to [Blue Coast Financial Group](#) for its Commitment to Excellence in customer service.

Rip-off Report's investigation of Blue Coast uncovers an ongoing commitment to total customer satisfaction and dedication to the success of its advisors. This means that its advisors can expect the company will always work towards finding a mutual and satisfactory resolution to any complaint or concern in an effort to insure that their advisors are successful. The company listens carefully to any concerns of its savings consultants and sees them as an opportunity to refine the business and become more efficient as a company in both the process and services they offer as well as the support they provide. The company does monthly [conference calls](#) for all of its advisors and has done national workshops. The company has brought systems in place to proactively contact advisors working with clients. The company's staff is quick in its responses and is readily available for specific needs or questions that come up. All communication is kept in the CRM to eliminate questions on next steps.

One top executive of the company stated to Rip-off Report that BCFG's corporate philosophy is based on the premise that "they strive to provide both cutting-edge [cost saving](#) services as well as full training and support of these services in a multitude of formats that are easily accessible to the advisors." In simpler terms, they are looking for ways to make their advisors more easily successful by implementing cost-saving measures and backing them up with training and support, so they are readily and simply adopted.

The company has a high-touch resource center as its platform for training where the advisors can access [webinars](#), conference calls, videos and even certifications on the specific service they may be approaching a client with. Pod-casts and recorded versions of the coaching calls are also on the resource center in case a call is missed. The company has even done national workshops where they have brought all the advisors together for training and relationship building and to meet the staff. The CRM system provided by the company tracks client activity and allows communication between all members of the company that are involved with a particular client, allowing for seamless communication and service. In sum, they provide comprehensive training and tools.

Rip-off Report has confirmed that the company takes [quality control](#) very seriously. They have constantly put effort into ramping up both their support team and client relation processes over the years. Currently, the company goes so far as to initially provide pre-set, face-to-face appointments for its advisors, training on other critical areas for [marketing](#), and even a closing desk that helps close the clients for its advisors and introduce additional services that are of benefit.

By providing initially things like pre-set face-to-face appointments with all the different services they offer, they have created an environment where the company can help the advisor get to his or her clients. It's very much a team consulting environment, from building the relationship with the client, to guiding them through the process of producing savings, so that the advisors aren't left doing it on their own. The company continually strives to do more of the work for the advisor in order to assist them with closing the clients. As one executive said, "When our clients succeed, we succeed. It's in everyone's [best interest](#) for us to help them."

Since the advisor's success is directly related to the activity level of the advisor, the company takes a very proactive approach and active role in helping the advisor present services to the client. As an example, the company recently added an advanced follow-up program to help its advisors collect any paperwork from clients. In addition, the company now calls advisors before and after their appointments and checks in on the activity of the advisor with clients. This way they are aware of any potential issues and can intervene as necessary early on with the advisor. The company is a registered business opportunity and provides disclosure documents to its advisors outlining its responsibilities and those of the advisors as well. Rip-off Report was pleased to learn that the company's past and current approach to business is focused on its pledge to total commitment towards the success of its advisors, from disclosure to training to [appointment setting](#) to closure and follow up.



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1 Author 0 Consumer 0 Employee

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WBZ - Be Wary of Door-to-Door Scams

BCFG recognizes any complaint posted on Rip-off Report (true or not) is an issue that needs to be addressed and if handled correctly can be valuable learning opportunity. With the feedback generated by Rip-off Report's Investigation, they continue to make organizational enhancements allowing their savings consultants a more streamlined approach to problem resolution and a total overall commitment to a positive [customer experience](#).

In summary, after our investigation, which included the one complaint that was filed with us, we found 100% total customer satisfaction with BCFG's service and care for the advisor. We then had further discussions with senior management and Rip-off Report is convinced that the company has been and will be committed to quality delivery of services resulting in total customer satisfaction to ensure their advisors' success. We conclude that this company can be trusted.

[Read about Blue Coast Financial Group.. see their websites and the services they have to offer..](#)

Any business that belongs to the Corporate Advocacy Program has given their Commitment to Excellence and Total Consumer Satisfaction. That's why consumers should feel safe, confident and secure when doing business with a member of Rip-off Report's Corporate Advocacy Business Remediation & Customer Satisfaction Program. ..Yes, a long name for a program that does a lot for both consumers and businesses alike

[Read about Rip-off Report Corporate Advocacy Business Remediation & Customer Satisfaction Program...A program that benefits the consumer, assures them of complete satisfaction and confidence when doing business with a member business. this program works.](#)

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**NOW TO THE ORIGINAL REPORT THAT WAS FILED**

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Shawn Hull, Blue Coast Financial Promoted as consulting business promises training, support, [qualified leads](#) an opportunity to make money consulting with big business on saving tax money Texas Nationwide

Dear Editor:

Please publish the following post:

I would like to retract my original post. I was completely wrong for posting what I did about Blue Coast Financial.

When I wrote this complaint I was focused on something completely different than this business and was venting my frustrations which were caused by other things. As a single mother, I have many good days, but also those days when everything seems to be going wrong. It isn't right to just say anything to let out those frustrations, and it isn't fair to a company when those statements aren't the whole story. It is a different story though when you have a company like this that does try and help you succeed. Like any business you should investigate it, but you should be able to get the whole story and know that you have to put in the effort and work it to be successful no matter what the company will do to support you.

The company did provide training, support and qualified leads. They had a lot of different types of training.

Some of it I did attend and some I didn't as I was focused on something different, not this business and I guess I just had a pre-set opinion. I didn't go on all of the appointments the [company set up](#) for me. To be completely fair, the company offered me even more appointments to go on to help me engage in my business but I kept looking to blame somebody else instead of taking ownership of my own business.

The company still stuck with me even though I wasn't fully committed to do what needed to be done. The staff kept calling me and tried to get me started, but I really never got my business started. The company did not mislead me and I know of no history of the them misleading anyone. I just felt that way because I never got it running and blamed someone else. I regretted my decision to post as I should have acted professionally and approached the company directly with any concerns.

So, for what it's worth, I did sell my business to somebody else and I wouldn't have sold it if I felt there was any problem that somebody else would experience. I never thought about how my post would affect other business owners' clients and that is one reason I wanted to clear this up; it's not fair to the company or them.

After my post rip off report investigated the company and that made me think about what I was actually doing. I would like to apologize to the company and staff that tried to help me make this business successful. I know I should have just worked harder at it, but now I'm on to my next chapter.

Donna  
Charlottesville, VA

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