

FINANCIAL ADVISOR COACHING INSTITUTE

High-Net-Worth Advisor

Certification Program Outline

Unit 1:

- 1. Creating a Compelling Business Plan**
- 2. Time Mastery for Financial Advisors**

Facilitation Meeting #1: Financial Advisor Coaching Institute – High-Net-Worth Advisor

Unit 2:

- 3. Seven Immutable Laws of Marketing Success**
- 4. How to Master the Art of Target Marketing**
- 5. Strategic Partnerships with Accountants**
- 6. Conducting Client Luncheon Interviews**

Facilitation Meeting #2: Financial Advisor Coaching Institute – High-Net-Worth Advisor

Unit 3:

- 7. Growing with Client Appreciation Events**
- 8. Client Advisory Boards: Maximizing Success**
- 9. Marketing with Client Referral Seminars**
- 10. Delivering the Ultimate Client Experience**

Facilitation Meeting #3: Financial Advisor Coaching Institute – High-Net-Worth Advisor

One-on-One Certifications: Financial Advisor Coaching Institute – High-Net-Worth Advisor

FINANCIAL ADVISOR COACHING INSTITUTE

High-Net-Worth Advisor

Module 1: Creating a Compelling Business Plan

Section 1: Certification/Assessment Criteria

Section 2: Session Content

Session Overview

What's in a Business Plan?

The Executive Summary

The Executive Summary – Do It!

Your Mission

Your Mission – Do It!

Your Vision

Your Vision Statement – Do It!

Your Values

Clarify Your Values – Do It!

Your Core Beliefs

Write Your Core Belief – Do It!

SWOT Analysis

SWOT Analysis – Do It!

The Marketing Plan

Define Your Marketing Strategies – Do It!

Your Five Year Practice Goals – Do It!

In Summary

Section 3: Facilitation Meeting Application Questions

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Module 2: Time Mastery for Financial Advisors

Section 1: Certification/Assessment Criteria

Section 2: Session Content

The Importance of Time Mastery

The Importance of Time Mastery – Do It! (interactive)

Three Keys to Time Mastery

Three Keys to Time Mastery – Do It!

Time Mastery Priorities

Time Mastery Priorities – Do It!

Time Mastery Business Goals

Time Mastery Business Goals – Do It!

Time Mastery Personal Goals

Time Mastery Personal Goals – Do It!

Schedule Your Priorities

The Ten Commandments of Time Mastery

Section 3: Facilitation Meeting Application Questions

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Module 3: Seven Immutable Laws of Marketing Success

Section 1: Certification/Assessment Criteria

Section 2: Session Content

The Law of 80/20

The Pareto Principle – Do It

The Law of Relationships

Benchmark Your Practice – Do It

The Law of Sales Currency

The Law of Duplicatable Success

Benchmark Your Systems – Do It

The Law of the Funnel

Calculate Your Sales Funnel Goals

The Law of the Third-Party Endorsement

The Law of the Endless Intro

Section 3: Facilitation Meeting Application Questions

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Module 4: How to Master the Art of Target Marketing

Section 1: Certification/Assessment Criteria

Section 2: Session Content

The Benefits of Target Marketing

How to Identify and Choose Your Target Market

Evaluate Your Current Book of Clients

Evaluate Your Current Book of Clients – Do It!

Success Strategies for Target Marketing

Three Powerful Strategies

Section 3: Facilitation Meeting Application Questions

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Module 5: Strategic Partnerships with Accountants

Section 1: Certification/Assessment Criteria

Section 2: Session Content

Session Overview

The Fundamentals of Marketing to Accountants

Marketing to Accountants - Do It!

The Winning Mindset: Strategic Partnership

Implementation Step One: Prospecting

Implementation Step Two: Conducting the Relationship Conversation

Implementation Step Three: Developing the Partnership

Implementing Strategic Partnerships - Do It! (Interactive)

Section 3: Facilitation Meeting Application Questions

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Module 6: Conducting Client Luncheon Interviews

Section 1: Certification/Assessment Criteria

Section 2: Session Content

The Client Luncheon Interview

Client Luncheon Interview Guidelines

Select the Clients

Extend the Invitation

Conduct the Luncheon Interview

List Your Best Clients – Do It!

Follow Up

List Your CLI Goals – Do It!

Section 3: Facilitation Meeting Application Questions

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Module 7: Growing with Client Appreciation Events

Section 1: Certification/Assessment Criteria

Section 2: Session Content

What is a Client Appreciation Event?

What are the Benefits of the Client Appreciation Event?

Why are Client Appreciation Events Effective?

Selecting Client Appreciation Events – Do It!

Variations of the Client Appreciation Dining Event

The Client Appreciation Dining Event Timeline

The Keys to Successful Implementation

Executing a Successful Client Appreciation Event

Setting Your Client Event Schedule

Schedule Your Client Appreciation Events – Do It!

Section 3: Facilitation Meeting Application Questions

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Module 8: Client Advisory Boards: Maximizing Success

Section 1: Certification/Assessment Criteria

Section 2: Session Content

Seven Powerful Benefits of the Client Advisory Board (CAB)

Are You Ready to Turbo-Charge Your Business? – Do It! (Interactive)

Underlying Principles of the CAB

Guidelines for CAB Implementation

Your Ideal CAB Member – Do It!

Planning Steps for Success

Planning Steps for Success – Do It!

Conducting the Client Advisory Board

Conducting the Client Advisory Board – Do It!

Section 3: Facilitation Meeting Application Questions

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Module 9: Marketing with Client Referral Seminars

Section 1: Certification/Assessment Criteria

Section 2: Session Content

The Value of Client-Referral Seminars

A Client-Referral Seminar Timetable

Who to Invite?

Client-Referral Seminar Invitation List – Do It!

Assemble Your Team

Event Procedure Manual – Do It!

Client-Referral Seminar Team – Do It!

Conducting a Successful Seminar

The Next Step

Section 3: Facilitation Meeting Application Questions

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Module 10: Delivering the Ultimate Client Experience

Section 1: Certification/Assessment Criteria

Section 2: Session Content

What is the Ultimate Client Experience?

Favorite Restaurant Experience – Do It!

Defining Your Client Communication Process

Step One: Define the Criteria

Platinum, Gold or Silver? Do It!

Step Two: Evaluate Each Client

Step Three: Schedule Client Service

Benchmarking Your Current Client Experience

Ultimate Client Experience Guidelines

ACE-A Exercise – Do It!

Ideal Office Experience – Do It!

Delivering the Ultimate Client Experience

Section 3: Facilitation Meeting Application Questions