Private Wealth Sales

Curriculum

Industry Laws and Regulations

The Features and Benefits of Managed Accounts
– The Funds Approach
– Proprietary Management
– Separate Account Management

The Features and Benefits of Tax Advantaged Accounts
– Inter Vivos Trusts
– Testamentary Trusts

Characteristics of Top Tier Sales Professionals

The Investment Management Sales Process

Prospecting Methods and Plans

Articulating Your Role as a Comprehensive Wealth Advisor

The Seven-Step Prospect Interview

Identifying Issues and Creating Concerns
"Analyzing & Prioritizing Opportunities"

The Six Steps to Winning Presentations

The Keys to Dynamic Proposals

Dealing with Delays and Handling Objections

Group Case Analysis Presentations

Developing an Action Plan

At Cannon, we recognize the special skills required of those charged with investment services and trust sales responsibilities. In our forty years of practical financial services training, we've developed the ideal school to help you target the profitable trust and investment prospect and turn that prospect into a client.

This class is conducted by dynamic professionals; and participants not only receive very practical and productive ideas on prospecting, interviewing, presentations and closing sales, but also will have the opportunity to practice and improve these skills. Each person in the class takes with them an action plan utilizing ideas received in class.

Who Should Attend

- Investment Sales Officers
- Financial Consultants/Advisors
- Trust New Business Officers
- Trust Sales Managers
- Trust Department Managers
- Personal Trust Administrative Officers with new business responsibilities
- Private Bankers with investment management/trust business development responsibilities
- Other Personnel with investment management/trust business development responsibilities

Key Benefits

- Participants leave with the dynamic initiatives of:
  – A personal prospecting plan for their market
  – A conversion plan for moving their prospects to clients
  – Top-line industry knowledge source guidance
- Establishment of a network for sharing ideas and contacts for selling trust and investment management services
- Exposure to different selling techniques and the sales cultures of other financial institutions

Class Schedule

Registration and orientation take place on Sunday afternoon and class begins on Monday at 8:00 AM. The one-week session closes on Friday at 3:00 PM. Attendance is mandatory at all sessions.

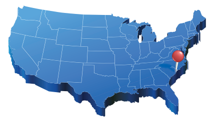
Faculty

Donna Gardner Schumell

Cannon Financial Institute
Milwaukee, WI

CANNON FINANCIAL INSTITUTE

COURSES



LOCATIONS

Myrtle Beach, SC

REGISTER

COURSES