PROGRAM OVERVIEW

Elevating Your Goals-Based Planning

This program focuses on client interaction skills and techniques needed to take prospects and clients through discovery conversation and to a retirement plan recommendation of a financial planning tool. It is designed for Financial Advisors working with clients with a main goal of financial security in their lifetime and retirement. The program utilizes interactive, practical exercises to teach and practice discovery skills and presentation of a **Financial Goal Plan** via a software tool.

Learning Objectives

- Determine your client's needs regarding "Lifestyle, Longevity, Liquidity, and Legacy"
- Describe and provide supporting evidence for why investors need help
- Identify "best practices" for successful onboarding
- Demonstrate how to describe the planning process and the investment management process using simple, succinct terminology and illustrations
- Show how to conduct a pre-qualifying telephone call and set appropriate expectations for:
    - Discovery Meeting ⇒ how to conduct a discovery meeting and get the information needed
    - Create a **Financial Goal Plan** ⇒ how to present a **Financial Goal Plan** and Insurance and Investment recommendations
    - How to conduct a client review of a **Financial Goal Plan**

Program Takeaways

- Know how to have an effective discovery conversation that leads to a planning conversation
- Position and lead planning conversations, allowing for assets to be consolidated with existing clients and serving as an opportunity to win the relationship with new clients
- Deliver a consistent client experience, value proposition, and messaging about the importance of planning in the whole process while being confident and not sounding salesy