How to Explain What You Do:
A Holistic Wealth Advisor

Program Description

There are more than 600,000 client-facing representatives and brokers working in the US today. Therefore, most prospects already have a first impression of the role of an advisor. This is a significant problem for advisors who want to introduce their client-centered, holistic wealth-management value proposition. If the people you most want to influence already have a first impression—and often a second, third and fourth—how can you break through those impressions, change their assumptions and get them excited about working with you?

This program is for advisors who want to learn a simple but powerful, step-by-step process for describing their holistic wealth-management business and introducing their new Standard of Care to existing clients, potential referral advocates and prospects.

Topics include:

- An introduction to the power of visual learning on adult decision-making and how to structure a more compelling message
- How to use four “back of the napkin” drawings to influence the way decision-makers understand the value of the business
- Specific scripting for explaining the unique approach and value of the business
- How to design a referable message, stimulate urgency and focus the conversation on taking action with a next step

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