Client Acquisition Mastery Workshop

Master the *7 Critical Conversations to Build & Maintain a 7-Figure Financial Advice Business*.

AdvisorRoadmap
Virtual Training for Financial Advisors

Detailed Agenda
August 16th – 18th, 2017




A Guided Practice Environment with like-minded, motivated financial professionals engaged in hands-on, interactive, experiential learning to accelerate results. Includes a full-year membership to the AdvisorRoadmap™ Virtual Training Platform.

Develop the skills and confidence you can apply immediately with instant access to powerful Online Courses to get your next ideal client… and the next one and the next one and the next one.

You will:

- attract better clients,
- implement full-service goals-based financial planning with prospects and clients,
- generate higher planning fees (up-front & ongoing),
- gather more assets,
- get more referrals,
- inspire clients to more quickly act on all your advice to fully implement their plans.

Just one new client easily covers the investment

What makes this workshop unique is the very, very, very small amount of lecture / note-taking time. That's because you learn the content via highly engaging, interactive online courses. You access these proven courses as soon as you enroll. Which means you get started right now to learn, grow, improve, and get results. Many advisors pay for the workshop and their membership to the virtual training platform before attending the workshop! The environment is like a martial arts dojo where like-minded financial professionals practice their skills. As a result, you rapidly develop skill and confidence that leads to results rather than just having more information that you may never implement in the real world. As you practice you get on-the-spot coaching for improvement.

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Day One; August 16th	
7:00 - 7:45AM	Breakfast & Registration
8:00 - 9:15AM	 Keynote Presentation by Bill Bachrach: People Skills to Build High-Trust Client Relationships to elevate your client value and grow your business.
9:15 - 9:30AM	Break
9:30 - 10:45AM	**Paired Practice:** Kill the "Elevator Pitch!" Instead master the art of interesting conversations that turn encounters with prospects into appointments with your next Ideal Clients. This is the process you need so when you meet people at networking events, on airplanes, at fundraisers, weddings or any other social events you can turn these encounters into appointments without sounding like a salesperson or a typical financial advisor trolling for business. Coaching Tips + Q & A. This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.
10:45 - 11:00AM	Break
11:00 - 12:15PM	**Paired Practice:** Part 1: Scheduling appointments to be in your office, with both spouses, and with all of their financial documents so they have a better experience and you have a higher conversion rate of prospects to clients and clients who take action on your advice. Part 2: How to open the initial prospect or client interview in a way that elevates your credibility, distinguishes you from other advisors, and prepares them for a positive experience where prospects are more likely to hire you in this first meeting and clients are more likely to consolidate all of their business with you. (This is where you start to shift investment-oriented client relationships to full-service, goals-based planning relationships.) Coaching Tips + Q & A. This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.
12:15 - 1:15PM	Lunch
1:15 - 2:30PM	**Paired Practice:** The initial interview continued. The Values Conversation. Values are the emotional "why" that drive how people make their most important decisions. In this session you will practice asking the most engaging and emotionally compelling questions of each spouse / partner, listening with true empathy in a way that continues to distinguish you from other advisors. This creates an overwhelming positive experience where prospects are more likely to hire you

	in this first meeting and clients are more likely to consolidate all of their business with you. Coaching Tips + Q & A. This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.
2:30 - 2:45PM	Break
2:45 - 4:00PM	**Paired Practice:** The initial interview continued. More practice with the Values Conversation. The more you do it the better you get. Practice = Skill = Confidence = Results. Coaching Tips + Q & A. This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.
4:00 - 4:10PM	Break
4:10 - 5:00PM	**Paired Practice:** The initial interview continued. The more you do it the better you get. Practice = Skill = Confidence = Results. Coaching Tips + Q & A. Tips to build your Script Binder to create a consistent client experience. This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.

Day Two; August 17th	
7:00 - 7:45AM	Breakfast
8:00 - 9:15AM	 Keynote Presentation by Mark Little: The Fundamental Concepts of Truly Comprehensive Services. As one of the most successful implementers of Values-Based Financial Planning® ever, and now as the president of Advisor PACT™, Mark brings a unique perspective to the meaning of "*Truly* Comprehensive Financial Services." By learning to provide the four things clients want most, but can't get at any price—Protection, Attention, Coordination, and Transparency—you'll soon find your clients can't help but refer you to everyone they know.
9:15 - 9:30AM	Break
9:30 - 10:45AM	**Paired Practice:** The Values Summary. By effectively summarizing the most deeply held values of each spouse / partner you create a compelling and inspiring vision of what a great advisor / client relationship looks like, sounds like, and feels like. As well as a strong sense of commitment that it's you they want this kind of relationship with. (This is how your clients discover that they want to terminate their relationships with other advisors and consolidate all of their business with you.) Coaching Tips + Q & A.

	This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.
10:45 - 11:00AM	Break
11:00 - 12:15PM	**Paired Practice:** The Goals Conversation. The Goals Conversation is a powerful discussion with both spouses / partners about their tangible goals that require money and planning to achieve. There are 4 crucial elements for every goal and when orchestrated properly this is a very inspiring conversation for prospects and clients. Goals are the tangible "what" that complement the emotional "why" of their values. The combination of their most important goals and most deeply held values creates a powerful force to help your clients make smart choices about their money and make an emotional connection that machines and other human advisors cannot compete with. Coaching Tips + Q & A. This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.
12:15 - 1:15PM	Lunch
1:15 - 2:30PM	**Paired Practice:** The "All the Money" exercise. How to artfully organize the financial documents and benchmark their current financial reality in a way that increases your credibility, confirming their initial impressions of your competence and trustworthiness. Coaching Tips + Q & A. This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.
2:30 - 2:45PM	Break
2:45 - 4:00PM	**Paired Practice:** Put it all together. Now you will practice the entire initial interview. The Opening, the Values Conversation, Goals Conversation, and the All the Money exercise put you in the perfect position to put an offer on the table to become their Trusted Advisor. Prospects will hire you in the first meeting and existing clients will upgrade by consolidating all of their business with you and engaging in a full-service, goals-based planning relationship.
4:00 - 4:10PM	Break
4:10 - 5:00PM	**Paired Practice:** Continue putting it all together. Continue practicing the entire initial interview. The Opening, the Values Conversation, Goals Conversation, and the All the Money exercise put you in the perfect position to put an offer on the table to become their Trusted Advisor. Prospects will hire you in the first meeting and existing clients will upgrade by consolidating all of their business with you and engaging in a full-service, goals-based planning relationship. Coaching Tips + Q & A.This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.

Day Three; August 18th	
7:00 - 7:45AM	Breakfast
8:00 - 9:15AM	 Keynote Presentation by Bill Bachrach: The Work Habits of the Most Successful Financial Advisors. You've heard the saying that successful advisors do what unsuccessful advisors are unwilling to do. What exactly *are* those things that the successful advisors do? And what exactly *are* those things that unsuccessful advisors do? During this keynote Bill will cover 4 key elements: 1. Client Acquisition 2. Client Service 3. Leadership 4. Time Management
9:15 - 9:30AM	Break
9:30 - 10:45AM	**Paired Practice:** Powerfully articulate your client value promise. Now that your clients' values, goals, and current financial reality are laid out nicely in front of them, it's time to put your offer on the table. You will practice articulating your client value promise in the context of their most important goals and most deeply held values and answering the two key questions, "how much does it cost?" and "what do I get?" You will be able to do this in a way that is totally transparent, is consistent with the fiduciary standard, and establishes clear expectations. Coaching Tips + Q & A. This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.
10:45 - 11:00AM	Break
11:00 - 12:15PM	**Paired Practice:** Commitment to Implement. Have you ever wished clients were totally committed to implementing your advice? You will practice a process for establishing commitment to the advice that will help them achieve their goals before the advice meeting takes place. Coaching Tips + Q & A. This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.

12:15 - 1:15PM	Lunch
1:15 - 2:30PM 	**Paired Practice:** Put it all together. Now you will practice the entire initial interview. The Opening, the Values Conversation, Goals Conversation, the All the Money exercise, Articulating your offer / value proposition, Answering their questions, and Commitment to Implement. Prospects will hire you in the first meeting and existing clients will upgrade by consolidating all of their business with you and engaging in a full-service, goals-based planning relationship. Coaching Tips + Q & A. This session aligns with the video lessons, video demonstrations, and scripts that are part of the online learning resources you have access to immediately when you enroll.
2:30 - 2:45PM	Break
2:45 - 4:00PM 	Group Discussion: Delivering on the promise. How to use your software, tools, and resources to impress your clients with excellent advice that is aligned with their most important goals and their most deeply held values so they can approach the future with the confidence that no matter what happens in the markets, the economy, or the world they will still achieve their goals. Time, Priority, & Calendar Management. You will learn the most powerful tactics for organizing your time around the highest payoff activities to produce consistent results. Q&A.
4:00 - 4:10PM	Break
4:10 - 5:00PM 	Facilitated Exercises: The Ideal Client Profile. The Script Binder. The Action Plan. Now that you have more skill and confidence to speak to anyone, anytime, anywhere, what will you do next to elevate your client value and grow your business? In this final session of the workshop you will develop a clear Ideal Client Profile so you know exactly who you want as clients. You will organize your script binder so you know exactly what to say and do to attract and acquire Ideal Clients. You will create a written, step-by-step action plan to implement your improved skills in the real world.

Register today at

www.ClientAcquisitionMastery.com

619-255-4888

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