# THE BEST ADVICE IS TRUSTED

AdvisoryEDGE™

# A WORKSHOP FOR PRACTITIONERS

In our 20 years of training advisors in multiple industries, we've found that the keys to better advising – advising that matters – are found in practice, not in theory. That's why the **AdvisoryEDGE**™ workshop is just that – a workshop. You'll get hands-on with real client scenarios and hone your edge in challenging practice sessions you can immediately apply to your business.

Every year we work with literally thousands of Advisors to extract, benchmark, and replicate behaviors and skills that really work. The **AdvisoryEDGE**™ workshop is the synthesis of proven best practices.

> **"I learned real-world strategies and skills I can apply to my practice."**
>
> *Kris M., CFP*

# PRACTICE BASED ON SCIENCE

There is no formula for a great client meeting. There's no recipe for building trust and growing client relationships. Advising clients is like making chili – everyone has their own style, and professional chefs constantly hone their process and add new ingredients.

However, there are a set of "rules" that the best Advisors consistently follow that helps them be more effective in helping clients, and in helping clients to trust them. These aren't made up – they're established principles like Confirmation Bias, Narrative Fallacy, and Availability Bias.

> **"The best part of the training was planning and practicing for real client meetings."**
>
> *Mike P, Financial Advisor*

# WORKSHOP AGENDA

## The Client-Centric Advisor

- Using an Advising process to create trust
- Creating client-centric messaging
- Avoiding assumptive traps and bias
- Leveraging the Ladder of Trust

## Engaging on Client Needs

- Differentiating yourself through your diagnosis
- Understanding Clients' Real Needs
- Helping Clients see the need
- Influencing Clients' perceptions of value

## Delivering Advice Clients Value

- Delivering Client-Centric advice
- Avoiding low-value advice clients reject
- Using advice to create deeper dialogue

## Gaining Trust and Commitment

- Helping Clients see the need for action
- Gaining Client commitment to next steps
- Helping Clients through hesitation
- Creating accountability partnerships

## Executing Differentiated Meetings

- Simplifying and clarifying complex concepts
- Using language and visuals that work
- Avoiding salesy or low-level behaviors

# BETTER ADVISING, BETTER RELATIONSHIPS

## ADVISORS WALK AWAY WITH REAL-WORLD, PROVEN STRATEGIES FOR:

- Acquiring new clients
- Consolidating client assets
- Reallocating and transitioning investments
- Introducing new strategies and products
- Dealing with nervous or angry clients
- Generating referrals and testimonials
- Dealing with fee concerns
- Developing relationships with heirs and beneficiaries
- Developing partnerships with Centers of Influence

**WHEN CLIENTS TRUST THE PROCESS, THEY BEGIN TO TRUST THE ADVISOR.**

**WHEN CLIENTS TRUST THE ADVISOR, THEY BEGIN TO TRUST THE ADVICE.**

**HOW AND WHEN YOU OFFER YOUR ADVICE IS CRITICAL TO BUILDING RELATIONSHIPS BASED ON TRUST.**

# BLENDED, MULTI-MODAL DELIVERY

**AdvisoryEDGE**™ skill development is designed to be able to fit into your work-flow.   We're specialists in blended learning, and we advocate use of the flipped classroom. We make use of technology everywhere it's smart to.  We organize and execute the learning to fit with your schedule and time constraints.

**THE POINT:** You get custom training engineered to your specifications, geared toward the results you want.

> **"I've already seen the results in my meetings – having a plan for building trust is a difference-maker."**
>
> *Mike P,  Financial Advisor*

## FOR MORE INFORMATION:

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AdvisoryEDGE™