

THE ADVISORY EDGE™

USING CONSULTATIVE PROCESS TO DELIVER CLIENT VALUE

Influencing clients to help them make good buying decisions is *NOT* a collection of sales techniques – it's a process. Top consultants in every field share a set of behaviors that help them wield maximum influence without sacrificing credibility. The result is more client value, more trust, and better business relationships.

WORKSHOP AGENDA

1. What top consultants have in common
2. Engaging on Client Needs
3. Delivering Advice Clients Trust
4. Generating Meaningful Commitments
5. Executing for Maximum Client Value

YOUR FACILITATOR:



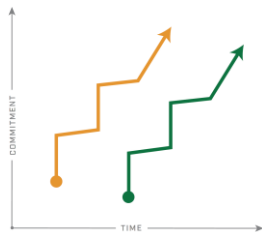
Dan Smaida has over 23 years experience helping advisors on five continents hone their EDGE.

WHO SHOULD ATTEND:

- ...You want to wield more influence as a consultant
- ...You're paid to deliver advice for a living
- ...You want to produce more results without being "salesy"
- ...You're interested in how the best consultants work their craft
- ...You want to build more trust and better business relationships

You'll walk away with:

A proven process based on science, used everywhere



A template for packing Your Digital Briefcase to execute consultative meetings

USE PROCESS TO CREATE MAXIMUM VALUE

THE ADVISORYEDGE™ PROCESS



WHAT YOUR PEERS ARE SAYING

- "Really practical advice I can apply to my business right away."
- Dawn M, financial advisor
- "Love the replicability of the EDGE process!"
- Lynn C, RIA principal
- "This session helped me see where we can prove our value to clients."
- Alan H, financial planner