

BETTER LISTENING, BETTER QUESTIONS, BETTER RELATIONSHIPS

VIRTUAL TRAINING

This is our Foundational Training that is applicable to all client-facing professionals. This Academy focuses on helping professionals close engagements faster, deepen their understanding of what the client really wants (for both the client and the advisor), and deepen client relationships. We also provide you with a simple way to clarify and establish mutually agreed upon expectations that allow dreaded conversations to be easily addressed.

Over the past 20 years of training, we have heard 2 consistent themes from our *Better Listening, Better Questions, Better Relationships* Academy attendees:

1. They use this training every day with almost every client and in their conversations with everyone - family, friends, etc. And,
2. The training paid for itself when they used it with their first client or prospect and the skills and tools they learned helped them build deeper relationships with both their existing clients and their families, which resulted in more current revenue, higher retention, and more referrals.

This training qualifies for up to 15 Continuing Education credits for CFP (likely other organizations, too!).

The Training includes:

- How to understand and facilitate your client/prospect's decision-making process;
- Using the 7-step Alignment Conversation™ to create deeper relationships with your existing clients, distinguish yourself from their other advisors (and competitors), and engage new "A" Clients; and
- Using the Expectations Conversation™ to set clear, agreed upon expectations with your clients and prospects. One definition of disappointment is "the difference between someone's expectations and their experience." Clients often have unstated (and sometimes unrealistic) expectations. If you do not know what those are, you are likely to unknowingly disappoint them;
- When multi-generational planning is appropriate for a client, an overview of The Heritage Process®, and where and how it can fit within your existing practice (which may be through collaboration).

This Training includes four on-demand videos (a total of about 5 hours) that you must complete before the 1-day live virtual session. Seating is limited for all of our Training Sessions.

We all know the statistics:

- A vast majority of inheritors fire their parents' primary advisors when they receive their inheritance (90%+ depending on the study). That means you will likely lose 80%-90% or more of your current clients' assets when they die.
- A similar number of widows (70%-80%) fire their financial advisors within a year after their husband dies.
- Most families fail to keep their family and their financial wealth together for three or more generations, and that has been true around the world for centuries (the most cited study says 90%). That means you will likely lose most of the minimal assets you retain after your current clients die.
- It is very difficult for a financial advisor to distinguish him/herself from their competition. Great client services, touch programs, expertise, and returns are the norm and do not distinguish you from others. And they are the expected minimums for your top clients.

You will walk away from this Training with practical tools you can use the next day, and it can pay for itself many times over with just one client. You will both learn and practice skills that will allow you to build deeper relationships with your clients, and provide the basis for you to fulfill your fiduciary duties to your clients.

For more information about this Training, please visit our website or email us at admin@theheritageinstitute.com, or call us at (503) 771-2257.