

Perception of Value for Significant Individuals and Families



To know how to think about their problems – all of them.



They want a greater sense of direction, confidence, and capability in all areas of life.



They want financial solutions to be part of much larger lifetime solutions.



They want advisers who can construct a lifetime plan for them.

TO ADVISE THE FAMILY YOU WILL NEED:

POSITIONING	FRAMEWORKS	RELATIONSHIPS
<ul style="list-style-type: none"> Be positioned on the family board 	<ul style="list-style-type: none"> Processes to demonstrate your value proposition 	<ul style="list-style-type: none"> High IQ, EQ
<ul style="list-style-type: none"> Price for your wisdom not your time 	<ul style="list-style-type: none"> 12 month agendas and meeting frameworks 	<ul style="list-style-type: none"> Can lead other advisers
<ul style="list-style-type: none"> Collateral to support Key Concepts 	<ul style="list-style-type: none"> Supporting documents 	<ul style="list-style-type: none"> Ability to “hold” the room
<ul style="list-style-type: none"> Have a best of breed support team 	<ul style="list-style-type: none"> Risk management frameworks 	<ul style="list-style-type: none"> Can collaborate

2 day intensive course
& 12 months support

4 Fold
Return

JOIN THE SIGNIFICANT ADVICE NETWORK

Year long learning, mentoring, coaching program with a “4 Fold Return”

1. Invest in yourself and new skill sets for the future
2. Be part of a like-minded (Best of Breed) network with flow on benefits back to your existing business
3. Bring a new skill set to market to your existing network and clients
4. Be energized and inspired as a participant in the next level of advice for Significant Families