BETTER LISTENING, BETTER QUESTIONS, BETTER RELATIONSHIPS TRAINING

This training is for successful advisors who desire to build better and deeper relationships with their existing clients and take their practice to the next level. From this training you will leave with practical tools you can use the next day, and it can pay for itself many times over with just one client.

The Training includes:

- An overview of Heritage Design, how it is an essential element for families when good financial and estate planning is in place/has been done, and where and how it can fit within your existing practice;
- 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.

Past attendees of this training say the training has:

- distinguished them from their competition,
- increased their profits and retention,
- equipped them to build deeper client relationships,
- created multi-generational client engagements, and
- increased the value of their practice.

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 more than 90% of your current clients' assets when they die.
- 90% of families fail to keep their family and their financial wealth together for three or more generations. That means you will likely lose 90% 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.

Heritage Design solves all three of these issues. And when implemented, it will provide you with increased current profits, increased retention of both existing client and their families, and distinguish you so you will attract more of your "A" clients.

Please visit our website to find the dates and locations of upcoming Training. Seating is limited for all Training.

Additional Details:

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.

This Training includes an online webinar that you must complete before the 2-day in person session.

Our ***Better Listening, Better Questions, Better Relationships*** Training will give you both an overview of Heritage Design services, and specific, practical, training that you can use the next day to increase your profit and retention (even if you decide not to provide Heritage Design services).

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