The Client-Centered Advisor

A Meaningful Conference Day Agenda from

The LifeWork$ Collective

For more information, contact Marie Swift:
(913) 649-5009 | marieswift@impactcommunications.org

If you are looking for a value-packed program for next chapter meeting, business retreat, Planner Resource Day, or national conference, here's your answer. Bring the wisdom of The LifeWork$ Collective to your group. This day-long program has been developed by four super star consultants. All four are leaders in their fields with national reputations.

Susan Galvan, MA
Educational Innovator / Advisor Trainer

Carol Anderson, MS
Financial Life Planning Pioneer / Research Leader

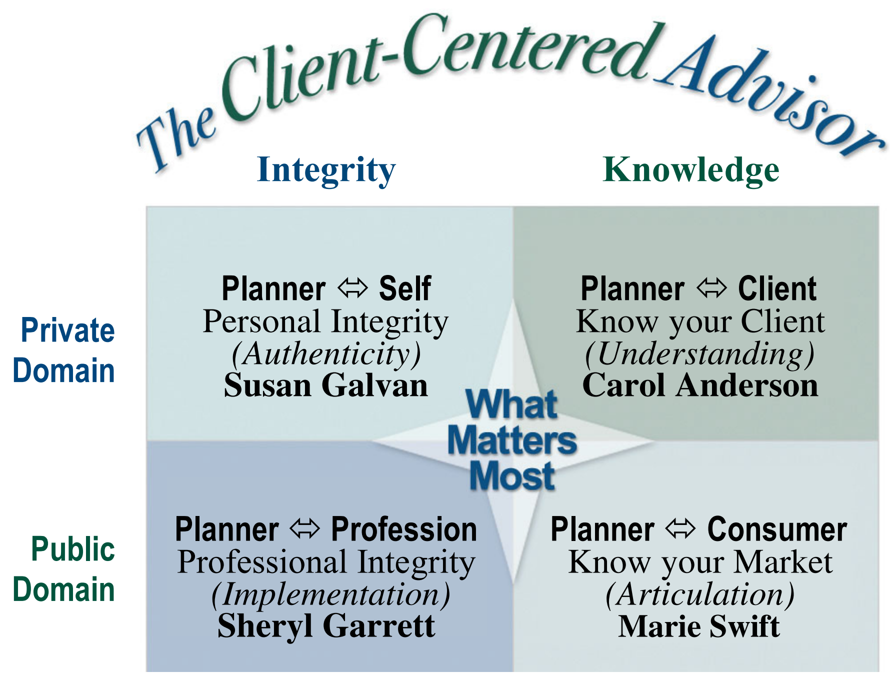
Marie Swift
PR Consultant / Award Winning Communicator

Sheryl Garrett, CFP®
One of the Top 25 Most Influential People in Financial Planning

True Success Hinges on Defining What Matters Most

As a financial professional, creating and maintaining a truly client-centered approach requires that you examine and nurture four interrelated dimensions of your professional life: being true to yourself *(Authenticity)*; exploring the values and priorities of each client *(Understanding)*; committing to highest standards and activities *(Implementation)*; and communicating your unique value proposition *(Articulation)*.

The Client-Centered Advisor is trained to focus on the heart of the matter.



Learn more about the program now →

The Client-Centered Advisor

The LifeWork$ Collective

For more information, contact Marie Swift: (913) 649-5009
marieswift@impactcommunications.org

Here's how the day would unfold.

Planner ⇔ Self

(Section led by Susan Galvan, MA, Educational Innovator / Advisor Trainer)

Many planners don't think of themselves as their own "client," but Susan Galvan, MA, says they would be wise to do just that. It is essential to listen to your own heart, to know your own truth, to follow your own vision, and live your own life plan before offering those services to another. This is the basis for ***Authenticity***, or personal integrity – to be living yourself what you would help others to do.

Susan Galvan is co-founder and CEO of the Kinder Institute of Life Planning, the nation's leading organization for holistic client-centered training. Partner George Kinder has twice been named "One of the Top 25 Most Influential People in Financial Planning." Susan and George co-authored "Lighting the Torch," a handbook for life-centered financial planners (FPA Press, November 2006).

Planner ⇔ Client (Section led by Carol Anderson, MS, Financial Life Planning Pioneer)

When you work with a financial planning client, it is essential to a) gather all relevant information; b) "listen" for what is most meaningful; and c) identify important goals and aspirations. This is the only way to truly ***Understand*** your clients and formulate comprehensive financial plans based on the uniqueness of the individuals you serve. Most importantly, your clients must be able "see" the link to their own values and priorities in order "buy in" and commit to the plan and advice you deliver.

Long-time client advocate and financial life planning leader Carol Anderson heads Money Quotient, a non-profit organization that develops tools and training for advisors and is committed to education and research that explores the dynamics of client-planner relationships.

Planner ⇔ Consumer

(Section led by Marie Swift, PR Consultant / Award Winning Communicator)

When reaching out to the public - to prospective clients, Centers of Influence and the media - to inform them of your services, it is essential to first ascertain what your target audience perceives as **their** needs and wants in relation to how their money intersects with their life. This requires the skill of ***Articulation***, the ability to put into words the longings and hopes of the audience rather than using oneself as a model of achievement.

Marketing guru Marie Swift teaches advisors how to communicate in a truly client-centered way and create a strong base of lasting success. The president of Impact Communications, an award-winning PR and marketing communications firm, she's been working solely with financial advisors since 1988. Her winning ways have been written up in Financial Planning, Morningstar Advisor, Horsesmouth, Investment Advisor and Research magazine.

Planner ⇔ Profession

(Section led by Sheryl Garrett, CFP®, One of the Top 25 Most Influential People in Financial Planning)

The final relationship which calls for effective communication is one's interaction with fellow professionals, in terms of best practices, ethical standards, and mutual accountability. This requires awareness and ***Implementation*** of the profession's best practices, engagement policies and standards, and how they align with your own ethics.

Sheryl Garrett has been a leader in the financial planning community for nearly 20 years. Founder of a nationally-acclaimed financial planning network and author of three books, she is the recipient of numerous awards, including NAPFA's Distinguished Service Award. She was named to Financial Planning magazine's Mover and Shaker list in 2004 and has for four consecutive years been named to Investment Advisor magazine's "Top 25 Most Influential" list.