C&J | INNOVATIONS

EXPAND YOUR CONVERSATIONS TO IMPROVE YOUR RESULTS™

Successful financial advisors recognize the importance of creating meaningful relationships with their potential clients from the first conversation. Today’s clients want an advisor who understands what’s important to them not just in their finances, but in all areas of their lives. Improving those initial conversations proves essential to increasing the probability of developing a long-term client. By having the right tools to expedite the learning process, an advisor can create immediate value and lay the groundwork for solid, lasting relationships.

To create these tools and give advisors the edge they need, Colleen Bowler, CFP, partnered with Jeanne Hurlbert, PhD. By combining Colleen’s 25 years of financial experience – and her long tenure with Strategic Coach® – with Jeanne’s expertise in building assessments that engage prospective clients, Colleen and Jeanne created two impactful online assessments and in-person workshops. **Your Expansion Passport™** serves individuals in the asset accumulation phase of their lives and **Your Walkaway Passport™** focuses on those nearing retirement.

Advisors can use both tools to guide client or prospect conversations. By addressing these key areas, an advisor showcases his or her holistic approach to supporting the creation of a “life blueprint.”

The value of the assessment for the prospective client lies both in the ability to measure and compare where they are to where they would ***like*** to be and also in the customized feedback that will speed their progress. The value for the financial advisor comes from the accelerated learning provided by the Passport report: The report identifies ***exactly*** where to focus to create value for that specific client and enables the advisor to easily document and communicate the client's progress during the annual review process. Through repeated use of this tool, the advisor gains unique understanding of the most prevalent challenges among prospects.

Each assessment begins by asking the prospect a series of straightforward questions that identify his or her **current situation and future goals**. After completing the assessment, the prospect and advisor can meet, either individually or in a workshop, to review a detailed report that measures the prospective client’s distance from the goal on each mindset. The advisor provides customized feedback – complete with actionable steps – on how they can move closer to each goal.

The advisor and prospect then discuss what a partnership could look like. Because the assessment gives the advisor insight on the prospect’s priorities, the advisor can create his or her recommendations easily.

The process allows advisors to tailor their planning processes and marketing approaches. This program also provides workshop materials (presentation slides and notes) that allow the advisor to engage in a one-hour conversation with potential clients.

Colleen and Jeanne designed every part of this program – including customizable materials, follow-up emails, reporting tools, and data dashboards – to support the advisors in growing and expanding their reach, their firm, and their results.

DELIVERABLES:

- Two assessments – Your Expansion Passport™ for the accumulation phase and Your Walkaway Passport™ for those nearing retirement – programmed and customized for the advisor with his or her logo, compliance information/disclaimer (if applicable), contact information, and call to action;
- Instructions and support for the advisor's team to deploy the assessment on the advisor's website;
- Email notifications, with a PDF of the prospect's custom report, that alert advisors when a prospect or client (e.g., for annual review) completes an assessment;
- Workflows that advisors can use in Redtail (or another CRM system);
- Downloadable presentation decks for advisors to conduct workshops on Your Expansion Passport™ and Your Walkaway Passport,™ with speaker notes;
- Live coaching calls to facilitate advisor success;
- A printable version of the assessment questions for workshop participants;
- A printable report for workshop participants who completed the assessment in advance;
- Support materials for workshop setup and follow-up;
- Sample email copy advisors can use to invite prospects to take the assessments, attend the workshop, and set up a strategy session with the advisor; follow-up emails for those who do not schedule a strategy session;
- A satisfaction survey for workshop attendees, to generate social proof of the value provided;
- A summary report (in our system) that summarizes data for each assessment;
- A data dashboard for each assessment;
- A login to our system to access the data summary reports and the dashboard; and
- An Opportunity Tracker to document seminar results.

C&J INNOVATIONS

For more information or to schedule a time to talk, please contact:

Jeanne Hurlbert (Jeanne@CandJInnovations.com) or

Colleen Bowler (Colleen@CandJInnovations.com) or call them at (833) 425-4666.