Clients For Life

Implemented Portfolios

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What is it?

Clients for Life is a workshop series based on a successful roadshow of the same name previously delivered to over 1000 advisers across England, Wales, Ireland and Scotland.

"Clients for Life" is designed to facilitate a conversation which helps advisers to -

- Create deeper relationships with clients
- Better articulate their value
- Build more profitable advice businesses
- Create greater income certainty
- Achieve greater business efficiency and scale
- Reduce compliance risk

Who is it for?

The program is designed for any adviser who is wanting to rewire and enhance their advice business to be more in line with today's most successful advice models which hold a clear focus on client relationships as a priority over daily distractions that cost businesses efficiency, time and money.

"Clients for Life" is for you if you're an adviser who wants to -

- Build a clear value proposition that clients love
- Help to steer your business in a new direction
- Improve your efficiency and profitability
- Spend more time with your clients
- Ensure your career starts on the right foot (for new advisers)
- Learn and share ideas with fellow advisers in a small group setting

Content Outline

Workshop One

Starting from where you are now

- Why do clients pay you?
- What do clients want? What don't they want?
- Your ideal client
- Your role as the "trusted adviser"

Workshop Two

Delivering Value

- Why understanding values is so important
- How to help clients identify their values
- A better way to help clients set goals
- Your best clients

Workshop Three

Conducting Epic Meetings

- What an epic first meeting looks like
- Asking the right questions (client preferences, values, goals)
- Controlling the meeting
- Positioning your value
- Positioning your role as the "trusted adviser"
- Positioning fees
- Post meeting process

Workshop Four

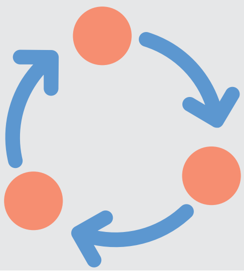
Professional Fees

- Why do clients pay you?
- The various ways you can charge fees (pros vs cons)
- How to present fees

Content Outline

Workshop Five
The Planning Process

- Formulating strategy
- Focusing on more than just retirement
- Having a consistent investment philosophy
- Presenting your recommendation in a way that has impact



Workshop Six
Business Efficiency

- Importance of process
- Creating scale
- Where technology can help remove unnecessary workload

Workshop Seven
The Ongoing

- Relationship
- Communication
- Best practice review process
- Reviewing fees
- Generating more referrals

Client Testimonials

The Clients for Life program has been invaluable in guiding the future of my business. The program assisted me to set a fee structure and to have the confidence to articulate this to clients. I have been able to streamline some of my processes with some new technology ideas, and now have some new processes in place to keep my clients engaged. Thanks to this program, I now have a niche area of advice defined and have a direction and focus for my future plans. I can't recommend this program highly enough.

Liz Haile, Financial Planner
Haile Financial

Committing to fortnightly sessions on client-centric business development is a big deal, but it's totally worth it. The course is a good mix of discussion with peers about various subjects to learn from each other, as well as Phil sharing wisdom about his own personal experience as a financial adviser, as well as what he's learned from others who are thriving in the industry. Taking action from the program, I've got a new assistant starting next week, I've charged my highest fee to date, and my engagement with clients has significantly improved. I highly recommend the program as it forces you to reflect on what you can do better, and guides you to know what changes will make the biggest impact.

Grant Millar, Financial Adviser
.Grant Millar and G&A Family Investments Pty Ltd

As a 20 year plus planner, I thought that I'd heard and witnessed most everything.

However the "Clients for Life" program really helped me to re-evaluate my position, methods, and business processes, providing me with both personal reinvigoration and practice efficiencies that will improve my life and practice tremendously.

A huge thank you to Implemented Portfolios for encouraging me to look at things in a different light, and opening my eyes to the many exciting opportunities that lay in store.

They say that you can't teach an old dog new tricks – whilst this may be true, the "Clients for Life" program showed this "old dog" that there are many different ways of doing the tricks efficiently!!!

Shane Moodie, Director/Financial Planner
Quantum Wealth Solutions

Clients For Life

How is the course delivered?

- Via video conference webinar
- Small group sessions of 6-8 advisers
- 7 x 1.5 hour sessions (1 session per fortnight). Total length - 14 weeks

What does it cost?

- $999 (inc GST)

Will CPD points be assigned to this course?

- Yes, this course will be CPD accredited.

How to register

- To register for our Clients for Life program, please email us at info@implementedportfolios.com.au or click HERE.
- A member of our corporate development team will be in touch with you to discuss dates and any other necessary information.