GET PAID WHAT YOU'RE WORTH

Hi, I'm **Kim Payne**, coach/ consultant to award winning Financial Advisers. I help those who provide Financial Advice (Financial Advisers, Mortgage brokers, Risk Specialists, Stockbrokers and Accountants) to grow their business by consistently demonstrating their value and getting paid what they're worth.

I do this through sharing practical tips and strategies to use 'value' as powerful growth tool delivered through workshops, speaking, private coaching and online training programs / templates.

After all, VALUE is what people are buying, price is just what they pay.

This 'Get paid what you're worth' template (part of my coaching program and using value workshops) has been responsible for helping many Advisers more confidently demonstrate why prospects / client's need their advice and understand why working with them is incredible value for money.

This has done wonders for their bottom line.

Without it, you can waste time and money trying to figure out why clients are not proceeding or objecting to your fees and missing incredible opportunities to make a difference their lives.

With it, you'll be able to help clients realise they can't move forward without your help, otherwise they would have done it already.

You're worth it, right?

Kim

Here's some inspiration to get the most out of this template

Firstly, this is a template to give some you some ideas around content and design when it comes to helping people understand your value and why they are paying your fee.

You can use it in part or in full.

You will need to tweak it or reword sections, so it sounds like you wrote it.

You can add text from this template to different documents you already have in use ie.

- Terms of engagement
- Pricing / fee schedule
- Client emails - before or after a meeting
- Marketing brochures
- Website
- PowerPoint templates used in client meetings (ie. new client meetings, review / progress meetings)
- Client presentations

You can provide some or all of it in advance or following on from client meetings.

You can break it up and use each section on its own ie.

Initial advice
Ongoing support
Areas we can help

However you decide to use this template, it's been created to help make your job easier when it comes to explaining how valuable you are and how with your help, clients will be in a better position than if they were to go it alone.

This is an investment in them and their happiness.

This is an example of a cover page or text to use in your pricing documents.

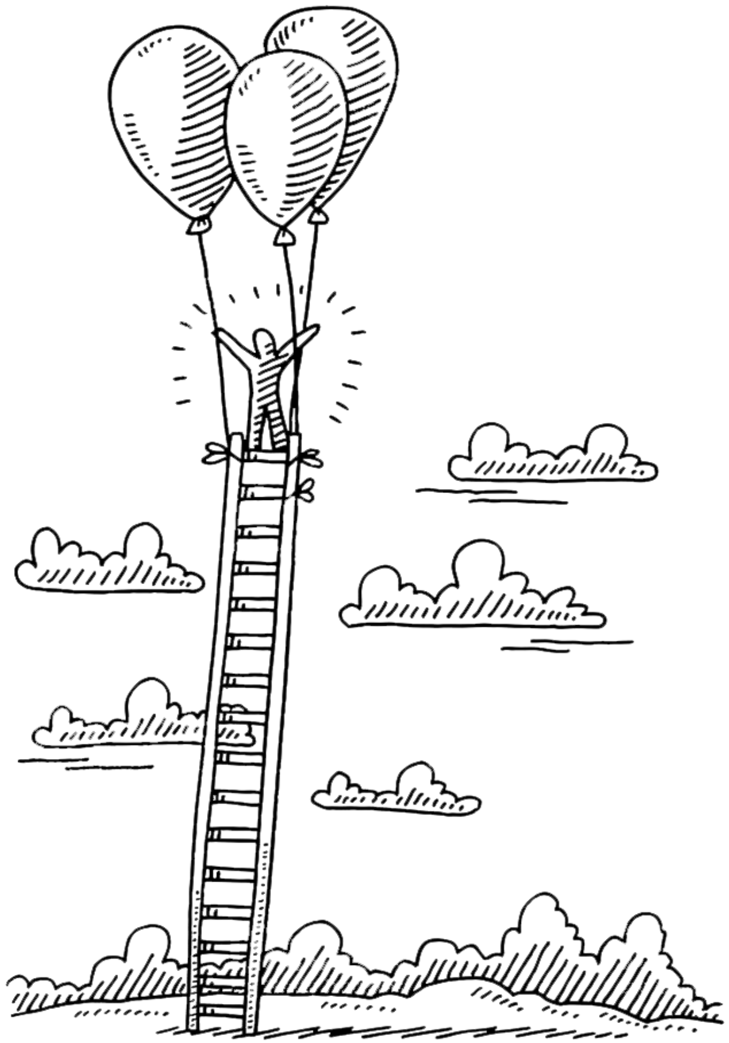
This is an investment in YOU and your **ongoing success**.

The cost of you not taking action or failing to resolve or address your issues, challenges or problems is only something you will know.

What we know is that this cost will probably grow overtime if you do nothing about it today.

What's that worth?

An investment in you



You are **worth** it

Here are some of the benefits clients will experience working with you.

The investment needed to get you where you want

What we provide is a solid framework, guidance and ongoing support so you can make smart decisions with your money that impact every part of your life.

What this means for you:

Reduces your effort & any hassle

Keep things simple & organised

Reduces costs

Saves you time

Reduces anxiety / stress

Makes you money & rewards you

Reduces risks

Prevents excuses from holding you back

Now is the time to invest in your happiness.

Helping you make it happen

Here is an example of text to position the initial stage of your relationship. You can add the actual fees they need to pay as the next page.

Life is unpredictable. Making decisions about it shouldn't be.

Here's how we make it happen:

INITIAL ADVICE – SETTING YOU UP FOR SUCCESS

Building a house starts with a blueprint and laying solid foundations. It's no different when it comes to managing your money.

Get to know you
We need to get to know you. And the more we know (the big picture stuff and the nitty gritty details), the more valuable our advice will be.

Strategize and crunch your numbers
Once we have all your information we'll get technical and analyse it, conduct financial modelling and forecasting, crunch the numbers, develop strategies and overall... determine the best solution for you.

Document the results
All the recommendations are documented in a comprehensive plan (called a Statement of Advice) which details all our advice, benefits, actions, risks, fees and expectations. It's big, compliant and includes everything you need to know to move forward.

Understand the advice
We present all the advice so you fully understand what's involved and importantly how it will help. If something is not clear, speak up so we can further explain until it makes sense.

Additional expertise
If you need advice from other experts, and we'll bring the right ones into the mix at the right time and co-ordinate it so we are all on the same page. We've got relationships with trustworthy professionals who'll also have your back.

Make it happen
Don't have time or patience for completing and following up tedious administration and paperwork. Leave it to us. We'll manage it on your behalf, follow it through to completion and make sure all boxes are ticked so it gets processed sooner. And if we can skip the que with our VIP relationships, we're onto it.

A relationship, not a transaction
We're in this for the long haul. Helping you make financial decisions for a better life is our calling. We're not going anywhere so be prepared for a 'happily ever after'.

Overall...we're here to help you feel confident about the decisions you make with your money – decisions that can measurably impact every part of your life.

Ongoing support

Here is an example of text to position the ongoing stage of your relationship. You can add more specific details here ie. 2 progress meetings etc. You can include the actual fees as a next page.

Just like getting fit, you can't go to the gym once and expect to be fit for life.

The real value is created by frequently revisiting your plan and making changes that are necessary as your life plays out.

Stay on track – Ongoing Progress
To keep your financial affairs performing at their best, they need an expert eye cast over them on a regular basis. As your life unfolds, things will change. And although some change may not seem significant, we need to assess any potential impact and explore any opportunities so you continue to improve your overall financial well-being.

Stick to your commitments - Just do it
Ever procrastinated, avoided making a decision or know what needs to be done and just lacked motivation? You are not alone. With us on your team, we'll make sure you take action on what's important, not just talk about it. It's the only way results happen.

Stay in the know - Knowledge and Education
Financial issues have become extremely complex and figuring out what's what can be a job in itself. We'll shed a light on as much or a little as you want to know through our Knowledge and Education Program.

We've got your back - Monitoring
While you are doing your thing, we are actively involved in making sure what is going on behind the scenes with your money is under control. This way, you can carry on doing what you do best and leave this to us – it's what we do best.

Something on your mind – On call
You want to feel comfortable with your financial position as a lot rides on it. If you need to talk, to discuss something sensitive, raise an issue or make a decision (big or small), get in touch...that's why you have us on your team.

Don't miss a thing – Notifications or Alert
You don't ever want to miss an opportunity to improve your bottom line. Our notifications and alert service means we have our eyes and ears on what's going on in the business, economic and legislative worlds and if we foresee anything that may impact you, we're all over it.

Keep it simple – uncomplicate the confusing
Confused about something you've heard or unsure of the impact something that's changed, get in touch. Our role is to make things as simple as possible so you understand what it means – for you.

Say it as it is – the truth matters
We are straight shooters and will tell you the truth, even when it's not what you want to hear. This is the best way to get results.

Make smart
financial decision

Here is an example of some of the areas of advice your provide. You can add / delete where appropriate. A great one to remind existing clients or to position to new ones how you help.

HELPING YOU MAKE SMART FINANCIAL DECSIONS THAT IMPACT YOUR ENTIRE LIFE

Some of the areas where we can help:

Big picture strategic planning
Do you have a framework for clarifying and prioritising what you want from life? The things you need money for? And a process to help you make financial decisions that cater for your future without sacrificing all of the good things in life today?

Protect what you value | Insurance
Do you have affordable cover in place that adequately protects your life, health, family and income if something unexpected happened? Has it been reviewed in the last 12 months to ensure it covers what you expect?

Retire on your terms | Retirement Planning & Superannuation
Are you making the most out of your super? Is it structured in the best way to help improve your situation? Will you have enough money for what could be a 30+ year retirement?

Buy property, the right way | Mortgage Solutions
Making sure you have the right loan structure in place can potentially save you thousands and take years off your mortgage. Have you had it reviewed in the last 2 years and explored opportunities to ensure you have the best deal?

Leave your legacy | Estate Planning
Will you be remembered the way you want? What legacy do you want to leave? Is your will up to date? Have you considered all the options for distributing your assets when you're gone?

Protect your assets | Structure and asset ownership
Are your assets held in the most tax-effective way and protected from unforeseen risk? Have you explored all possible options to ensure this is the case?

Pay less tax, legally | Tax Planning
Do you work closely with an accountant? One that considers your big picture when it comes to minimising your tax? One that takes advantage of your current situation and your future plans?

Grow your wealth | Investment Planning
Do you have a disciplined investment plan in place? One where your investments are sensibly and carefully managed without taking unnecessary risk?

Make debt work for you | Debt Management
Is your debt structured to fully support your personal, lifestyle and business decisions? Could you be paying it off sooner and using it effectively to grow your wealth?

This is an example of a final page. You would include your own contact info.

An investment in you.

An investment that keeps giving back

You deserve to know what your future looks like financially, not just this year, but every year.

Now is the best time to invest in yourself.

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GET PAID WHAT YOU'RE WORTH

You now have a powerful template that you can use I part or in full and can help you get massive results when implemented correctly.

But, unless you understand how it fits into your business and forms a part of your overall growth strategy, it'll become another 'tool' in your collection that never gets used.

It's like buying a brand-new computer and not knowing how to turn it on.

So, if you want to use this template as way of clearly communicating and demonstrating your value, I can show you how through a more comprehensive guide I've called the From Value to Beyond Manual.

It outlines step by step how you can showcase your value across your business in order to get better results.

In this manual, I give you relevant examples, practical exercise you can use and apply them in your business immediately.

CLICK HERE TO GET YOUR COPY

You're worth it!

9rok CONSULTING