

EXPLAIN WHAT YOU REALLY DO



You help people think for themselves.



You assume enormous responsibility for helping someone achieve financial peace of mind.



You manage the important difference between what happens in someone's life and how someone is able to respond to what happens.



You provide reason to overcome fear.



You help people know what they don't.



You are responsible for managing someone else's success.



You help someone make difficult decisions and do what isn't possible alone.



You are someone's financial conscience.



You assume responsibility in someone's life that no one else will.

HIGHLIGHT YOUR CLIENTS' CONCERNS

You don't have the time or expertise to attend to your finances.

You don't know what you don't know.

There is too much information to digest.

You make decisions on the spur of the moment without adequate research and consideration.

You and your spouse disagree, so you end up doing nothing or one of you is unhappy.

It's hard to know the issues, much less the right decision.

You are uncomfortable about money issues.

You make most of your decisions with your emotions.

You have had bad experiences with advisers in the past.

You are disorganised and waste precious time.

You are not where you thought you would be at your age.

You thought you were doing well, now you are questioning yourself.

PROMOTE YOUR VALUE... SIMPLY

YOU (CLIENT)

Out of control

Emotional decisions

Minimal experience

Lack of time

Decisions in isolation

Indecisiveness

Complexity & Confusion

Constantly Changing

WE ADD

Reassurance

Objectivity

Expertise & Perspective

Discipline & Accountability

Big picture sounding board

Resourceful guidance

Simplicity & Explanation

Consistency & Stability

YOUR PHILOSOPHY AND VALUES SHOULD LINK BACK TO YOUR CLIENT

Your goals, dreams and concerns drive what we do for you.

Each issue impacts other issues. A key part of our role is to see the whole picture and how each inter-relates with the other.

We can't be experts in all things, so we are happy to work with your other advisers, or introduce you to capable, appropriate specialists etc. as needed.

An important part of the journey is to educate you and help you feel more familiar and confident with the issues and how we propose to solve them.

It's your money and your life. You ultimately drive what we do for you.

Planning is an on-going process, not a one-time event.

If you fail, we fail. If you succeed, so do we.



OUTLINE WHAT YOU EXPECT FROM YOUR CLIENTS

For our relationship to work, there are some things we expect from you:

Keep us in the loop about changes in your life.



Respond to our calls and messages. Meet with us when we request.



Be committed to do whatever it takes to get results you want.



If we do something wrong, or if you have any concerns, let us know so we can make it right



We are serious about your well being and request that you are too.

If you are pleased with what we are doing for you, please share the experience with others.



Pay our bills on time. You would expect nothing less.

EXPLAIN 'WHAT'S IN IT' FOR YOUR CLIENT

Having a 'sounding board' will help you make better and more informed decisions.

Saving you time and worry will permit you to focus on other things in your life.

We help you stay informed about issues that affects your ability to enjoy financial and personal success.

Our objectivity and experience helps you avoid the big costly mistakes that others make.

Our commitment to our ongoing training and education means you get the benefits, without doing the hard yards yourself.

We get that it's not just about money, it's about your life.



MAKE IT CLEAR THAT CLIENTS NEED YOU



DON'T GIVE CLIENTS A CHANCE TO QUESTION THEIR LOYALTY

We are your financial conscience.

Provide solutions and answers to address your concerns or questions.

Simplify the complex. Speak in your language.

Bring it all together, project manage / oversee everything on your behalf.

Help you make informed decisions (we do all the research and ground work).

Help you know what you don't know.

We assume responsibility for helping you achieve peace of mind.

We help you understand how you can live a better life.



HERE'S TO YOUR SUCCESS!

If you want to know how this material can help you catch and keep more dream clients whose lives you can change, please get in touch.

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