




**PROGRAM:** *Trusted Family Advisor Roadmap Program™*

**WORKSHOP # 1:** *Practice Management: Pregame Strategy™*

**WORKSHOP DESCRIPTION:**




Our program equips Trusted Advisors to successfully **retain** client-families, **differentiate** themselves in the market place, and **attract** new client-families. Given the following statistics, there is a lot at stake for advisors and their respective firms over the coming years, therefore, it is imperative to be proactively prepared to capitalize on this significant wealth transfer opportunity.

-  41 trillion dollars is being transferred to the next generation by 2052.
-  70% of a family's wealth does not make it past the second generation.
-  80%-90% of heirs reject their parents' financial advisors soon after receiving their inheritance.

To this end, our program enables advisors to evolve from a Trusted Advisor to the ***Family's Trusted Advisor***.

Our *Practice Management: Pregame Strategy™* workshop is focused on helping advisors identify the growth opportunities in their business, determine the multigenerational wealth needs of their client-families, and then matching the needs with practical solutions. In addition, we provide tools to advisors to facilitate these efforts including our *Capitals Cards™*, Positioning Statements, Discovery Questions, and *Decision-Action Guide™*.

**NEW SKILLS AND LEARNING OUTCOMES:**

-  Advisors gain a clear understanding of wealth transfer statistics, the research pertaining to what "keeps parents up at night" regarding their children and wealth, and the psychographics of the next generation.
-  Advisors are taught our process to successfully engage the multigenerational needs of their clients.
-  Advisors learn step-by-step how to design and execute a successful multigenerational family meeting.

**ATTENDEES:** 25-35 Advisors who have some portion of their client base with 5MM+ AUM.

**WORKSHOP LENGTH:** 3 - 5 hours