

MODULE 1

Why the Best Are the Best



ADVISOR ADVANCEMENT INSTITUTE



Why are the best the best?

- They think beyond the balance sheet – offering holistic care that leads to growth
- They act as a partner to help their clients achieve their family, lifestyles, career, and health goals
- They derive satisfaction from impacting people's lives
- They know their role is more similar to a life coach, than someone who manages money
- They take a broader, multi-generational, and inclusive view to helping their clients' families



Now that you've taken the quiz, it's a good moment to reflect on what you want to get out of this program.

Use this worksheet to consider the following prompts, and reflect on areas you'd like to improve.

Where I Scored Highest

Where I Scored Lowest

Why I Think I Scored High

Why I Think I Scored Low

Write out 2-3 behaviors that will help you build this area:

Write out 2-3 behaviors that will help you improve this area:



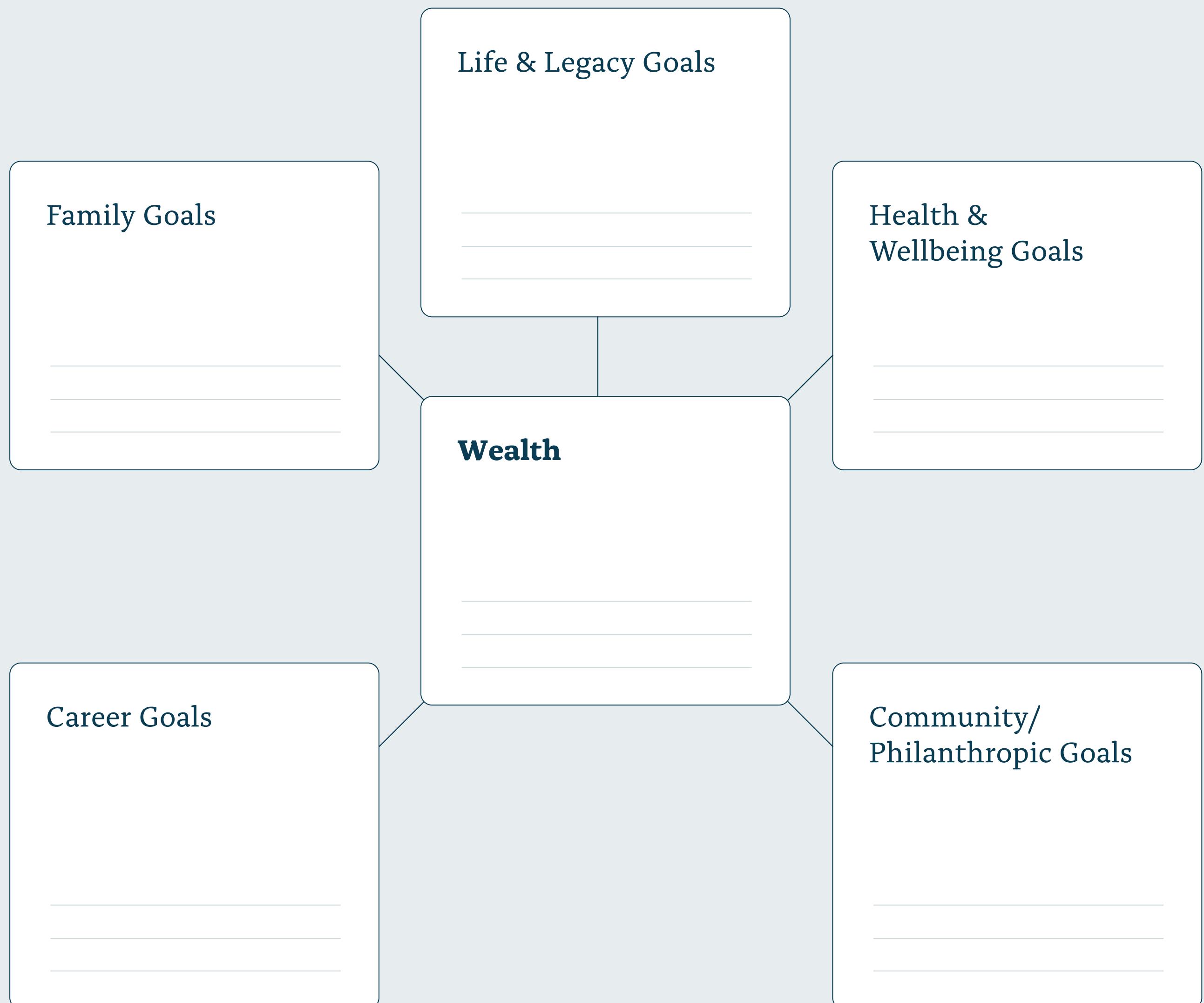
As you heard from our first module –

the best become the best by taking a holistic approach to a client's wealth.

They know how to think outside the box, and outside the balance sheet, for their key clients.

Use this worksheet to consider your client's holistic care – write out your client's goals across these key areas of their life.

If there is a specific goal, or area of their life you can't speak to, that's a good sign you should work with them to properly understand and plan for it.





Family Goals

Describe the values you grew up with, which values you live by and what you want to pass on to your children?

What kind of education would you like for your children?

What is on the horizon for your children (i.e. wedding, university, pregnancy, etc.)?

Life & Legacy Goals

Do you have a lawyer? A life insurance agent? An accountant? What do they do for you? How do you feel about those relationships?

How do you want to distribute your wealth after you're gone?

How do you feel about your current financial standing in terms of the legacy you want to leave?

Health & Wellbeing Goals

What health issues should we consider in our planning for you and your family?

What would you like to spend more time doing?

How active are you? (eg: sports, gym, yoga, swim, etc.)?

Career Goals

Tell me about your professional background?

What made you choose this profession? How do you feel about what you do for a living?

How important are your relationships with the people you work with?

Wealth

What is important to you about being financially independent?

Is there anything more important than that value?

What would you like to achieve with your money?

Community/Philanthropic Goals

How involved are you with your community and/or philanthropy?

Are there efforts that you would like to pursue in this area?

How important are your relationships with people in your community?



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