

Why pay to put ALL your advisors through training?

The Advisor Forum is a comprehensive, 9-month program designed specifically for *advisors yet to realize their productivity potential*, equipping them with explicitly defined strategies, skills and practices that will lead to accelerated achievement of their potential and the consistent delivery of a differentiated Client Experience.

Leveraging the experience and expertise of Greene Consulting, coupled with Best Practices shared among advisors from different firms throughout the country, participating advisors will leave the Program with the ability to confidently answer and deliver on the following questions:

- *How do get more qualified prospects into my pipeline?*
- *How do I engage those prospects to improve my close ratio, shorten the sales cycle and increase the revenue I generate from each sale?*
- *How do I develop the knowledge and skills necessary to engage prospects and clients in all the disciplines of wealth management, and do so in a way that differentiates me from other advisors?*
- *How do I leverage my financial planning software to engage more clients in a scalable goals-based planning experience that will accelerate my productivity?*
- *How do I enhance the relationship management experience I deliver to more effectively expand existing relationships, strengthen client loyalty, and generate more client referrals?*



Program applies to any client-facing advisor, including Wealth Advisors, Portfolio Managers, Trust Advisors, New Business Officers and Planners

Advisor Forum Testimonies

- *Thank you SO MUCH for the positive impact you've had on my career and my life. "I am SO blessed to have been a part of this Forum."* **Wealth Advisor**
- *"The growth I have seen in my business is directly attributable to the time I spent with you ... I want to thank you from the bottom of my heart for having helped me change my life and accelerate my career."* **Financial Advisor**
- *"I cannot overstate how much this has helped me."* **Portfolio Manager**

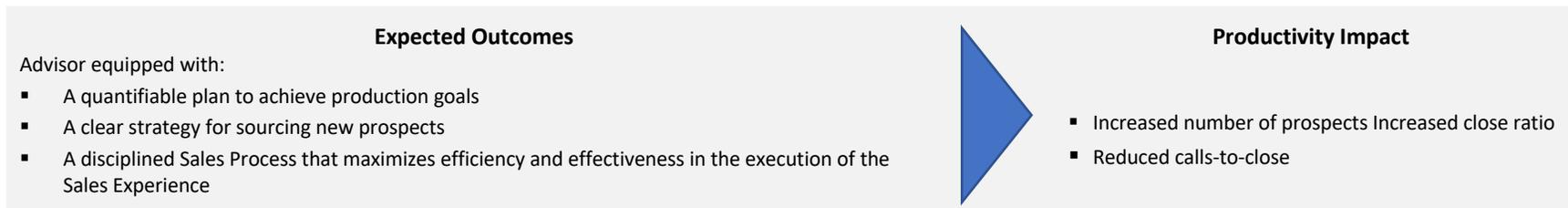
[See the following pages for program details](#)

Sessions Overview

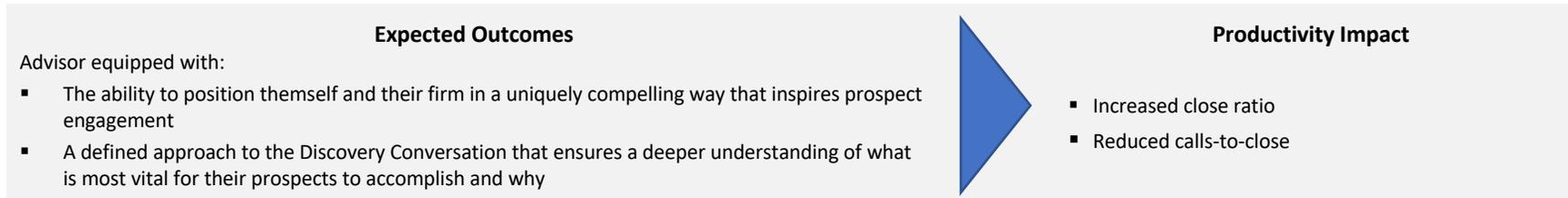
Program Orientation

- Define Program Objectives, Requirements and Expectations
- Introduction of Wealth Management Professional Knowledge Assessment designed to measure advisor’s wealth management knowledge – and confidence in that knowledge – relative to industry peers

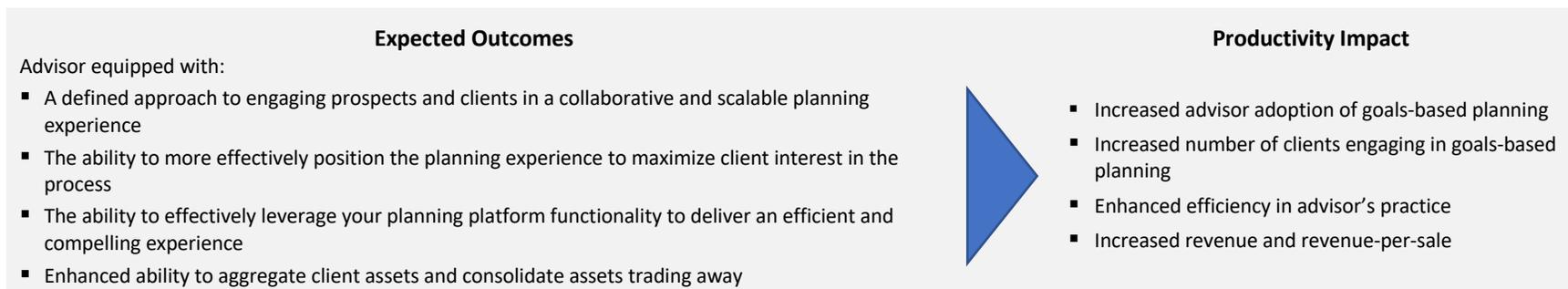
Defining your Sales Experience



Executing your Sales Experience

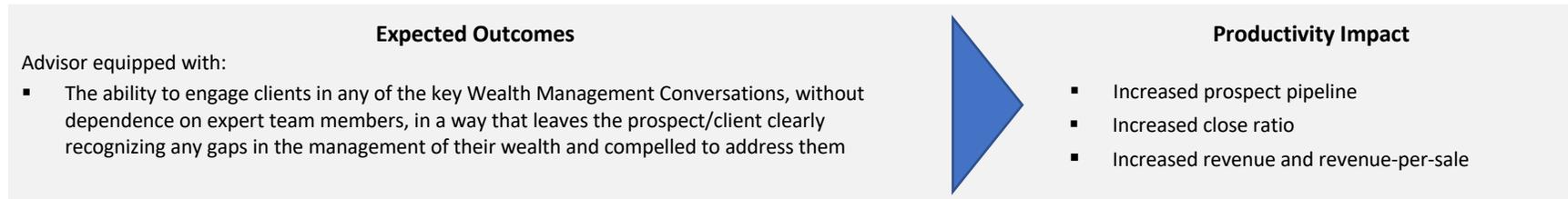


Delivering a Scalable, Goals-Based Planning Experience

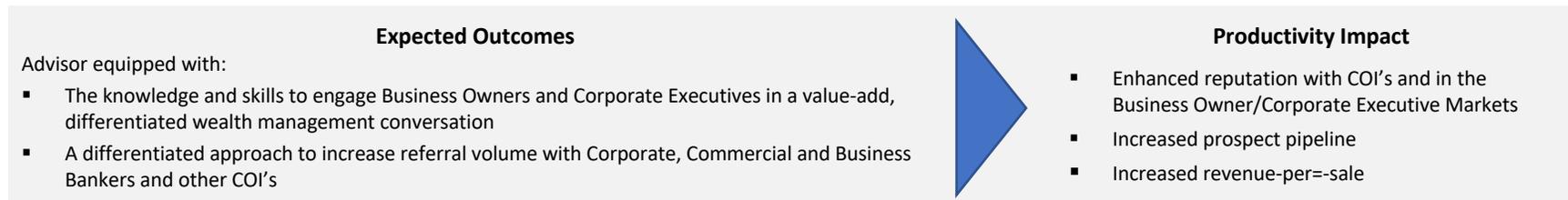


Sessions Overview *(Continued)*

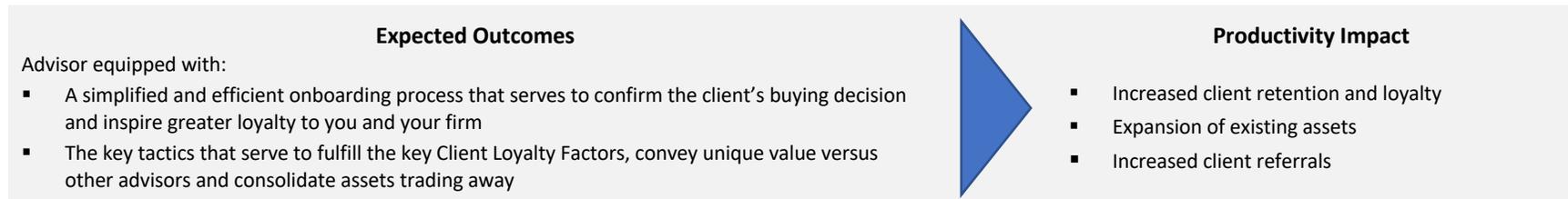
Mastering the Wealth Management Conversations



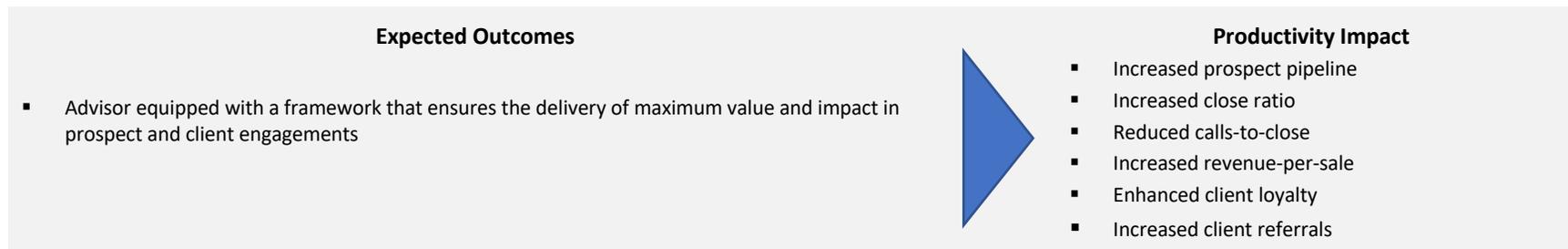
Delivering a Differentiated Experience with Business Owners and Corporate Executives



Fostering Client Loyalty via the Relationship Management Experience



Pre-Call Planning: Enhancing Client Impact and Productivity



Program Deliverables and Delivery Options

Additional Program Deliverables

- Access to Greene Consulting Online Wealth Management Conversation and Rapid Planning Modules throughout the course of the program
- Greene Consulting participation in one formal Pre-Call Planning Session per advisor as requested
- Ad Hoc Sessions to address specific issues and opportunities at group/advisor request
- Simplified Assessment Framework for managers to support advisor development
- Ongoing sharing of industry insight, ideas, and best practices

Program Delivery Options

- **Open Enrollment**
 - This option brings together individual advisors from various firms and locations.
 - All sessions to be delivered virtually.
 - Provides a unique opportunity to engage with peers throughout the industry.
 - Session cadence to be determined based on group input/preferences (every two weeks, every three weeks or monthly).
 - Minimum requirement of 10 advisors with a maximum of 20.
- **Closed Enrollment**
 - This option is available to organizations who choose to have a dedicated Forum for their advisors.
 - Sessions will be delivered virtually with an in-person option for Sessions 1 (Program Orientation) and 11 (Capstone) crafted to align to your organization's overall client experience, deepen advisor engagement and enhance results.
 - Session Cadence can be every two weeks, every three weeks or monthly based on the organization's preferences.
 - Minimum requirement of 12 advisors with a maximum of 20.

Program Pricing

\$5,000 per Participant

For More information

- Visit us online: greeneconsults.com
- Give us a call: 404-324-4600