adviserQuest
Adding Value to Your Advice

EVOLVING BEYOND INVESTMENT ADVICE

The 5 Crucial Conversations That Will Amplify Your Value In A Fee For Service Practice

www.adviserQuest.com

ABOUT THE WORKSHOP

Everyone in our industry is busy getting ready for the arrival of fee for service or has already started the transition to the fee for service business model. There is a lot going on in preparation such as spending time on understanding your CVP, segmenting, pricing and creating service packages for this new model. But what are you doing about the most crucial part of this transition? The crucial conversations that you must now start to have with your clients to help them understand the changes to your fee model? What about those conversations you need to start having with your prospects that have never experienced you, to help them understand the value of your advice, engage with your process and the personal & financial outcomes you will help them achieve for the fees they will pay?

We all know that the challenges with the fee for service transition is less about fees versus commissions and more about an understanding of the value created based on the relationship between the client and the adviser. Now more than ever the conversations you have with your clients must be focused on building long term relationships and your value proposition.

Recent research has revealed that clients are not as concerned with how they pay their adviser but how much they pay their adviser and the direct correlation between the fee and the value provided by the advice. Do the services and advice you provide far outweigh the fees you charge? Are your clients clear on the outcomes of your process and how they benefit directly?

In this workshop you will become aware of the "value touch points" in your current client engagement process. We will show you how to position yourself and communicate with your clients at these touch points and what to communicate in a way that amplifies your value and helps them to grasp the benefits of your offer.

You will learn about the 5 crucial value conversations that will help your clients to engage with you and your advice process at these touch points which will make the fee for service conversation more effortless. We will focus on the communication tools and the communication process that will add depth to your client interactions.

THEMES COVERED IN THIS WORKSHOP

- Value touch points
- Client Engagement process
- Client Experience Management
- Communicating the value of your advice

WHO SHOULD ATTEND

- Practice Principals
- Financial Planners
- Accountants moving into Financial advice
- Practice Managers
- BDM's

Your Investment:
$330.00 (inc GST)

Duration:
3 hours

THESE ARE SOME OF THE TAKEAWAYS YOU CAN EXPECT FROM THIS WORKSHOP

- An understanding of what clients want, how they think and what puts them off from taking up your advice in the first place
- Secrets to engaging your prospects and helping them to see the real value and the personal benefits of your advice
- Creative communication tools you can integrate into your engagement process for when you want to communicate your value in an easy to understand manner, in line with the industry's compliance framework
- 5 crucial conversations to add to your client engagement toolkit: The conversations that will assist your clients and prospects to understand the value of your advice process
- The importance of delivering a credible and compelling narrative when engaging clients and how to do it

WORKSHOP PRE WORK

All registered participants will receive pre work materials which will help to speed up the level of information absorbed at the workshop enhance. Full instructions provided on registration.

CPD POINTS

ASIC Competencies
3.5 CPD Points Generic Skills
1.0 CPD Point Generic Knowledge
FPA Professional Dimension
- Capability
- Critical Thinking
- Attributes and performance

CPD POINTS
4.5 Points awarded on completion

To **REGISTER** go to www.adviserQuest.com or CALL US ON **1300 886 907**

If you are interested in having this workshop facilitated in-house please contact us on 1300 886 907 or email transform@adviserQuest.com

AdviserQuest. Level 31, RBS Tower 88 Phillip Street SYDNEY NSW 2000

REGISTRATION FORM

AdviserQuest. Level 31, RBS Tower 88 Phillip Street SYDNEY NSW 2000 t: 1300 886 907 f: [02] 8211 0555

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TAX INVOICE

ABN 94 122 726 943

1. PERSONAL INFORMATION

Title Mr ☐ Ms ☐ Miss ☐

First Name .... Surname ....

Address ....

Email (Primary Contact) ....

Employer .... Occupation ....

DOB (dd/mm/yyyy) .... Mobile (Primary Contact) ....

Alternative phone number .... Licensee Name* ....

* If you are currently an authorised representative of, employed by, or otherwise associated with a holder of an Australian Financial Services Licence (AFSL) such as a bank, stockbroker or financial planning company, please provide the name of that person or company.

2. WORKSHOP DETAILS

WORKSHOP	TOTAL

3. DATE & LOCATION OF ATTENDANCE

Date of Attendance: .... Location: ....

4. PAYMENT OPTIONS

Funds have been transferred to or deposited in the following St George Bank account of "AdviserQuest Pty Ltd"

BSB: 112-879 Account: 483 052 023

Bank of origin .... Reference ....

Transfer date .... (Please include your full name in the reference section)

OR

Credit card payment. Please debit my:

Visa ☐ Master Card ☐ Bank Card ☐

Name on card ....

Card number ....

Expiry date ....

3 digit security code ....

Cardholder's signature ....

CREDIT CARD AUTHORISATION
Your signature on this page authorises AdviserQuest to debit the nominated credit card with the total amount payable for the goods and services ordered on this form. You warrant that you are authorised to use this credit card to pay for the goods and services that you are ordering from AdviserQuest.

This document will be your Tax Invoice for GST upon completion and payment.