<u>What will the advisor learn from this presentation?</u>

In this presentation, the advisor will learn that a very important part of the financial planning process is to know their clients, by having a very effective fact find and needs analysis interview which is the first step in the financial and estate planning process.

They will also learn how human behaviors can dictate what insurance or investment products the client wants and will purchase from the advisor.

<u>Presentation Overview</u>

An alarming study by Microsoft revealed that the human attention span had dropped down to just eight seconds, compared to twelve in 2000. With more and more content demanding attention in everyone's day-to-day, it can be challenging for financial advisors and insurance professionals to stay top of mind while competing with constant digital noise.

Before the technology boom, you could build awareness through a typical funnel that ultimately led to more sales. But now, consumers are impatient and are more likely to work with those who have gained their trust in the marketplace.

Achieving success in this economy requires the focus and development of a written plan that expands on winning marketing and sales strategies in the client commitment process, marketing plan, and top of mind systems.

Have you felt like your marketing has been a rollercoaster of inconsistent highs and lows with no real written plan guiding you?

Join Simon Reilly of Leading Advisor for The Ultimate Guide to Plan, Market, Prospect, Consult & Close - Live or Virtual to understand how to amplify your business through marketing and sales tactics in 2022.

<u>Financial Advisors and Insurance Professionals can benefit from:</u>

* Understanding what buyers believe and experience in the sales environment to align your marketing tactics in a positive, informative strategy that brings business.

* A guide to developing a written plan for the client commitment process through people reading, a needs analysis interview process, questions to qualify, a way to guide your clients to the experience they want, and help your clients make the right choice.

* Marketing processes to attract prospects, referrals, and your client's adult children.

* Information on free marketing tools, content ideas, social media marketing management, and top-of-mind tricks for financial advisors and insurance professionals.

"What not to do is just as important as learning what to do." – Simon Reilly