Prepare Your Practice to Thrive with Aging Clients and Families. ***A Three-Step Roadmap to Service Excellence and Success***

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What will the advisor learn from this presentation?

During this session advisors will learn how delivering a high standard of service excellence and an unparalleled customer experience through specific, strategic and achievable steps will ensure their practice thrives for years to come. Given new regulatory responsibilities, combined with the risks and rewards associated with working with high-value aging clients and their families, this presentation shows financial service professionals how to pivot their service offerings quickly in order to ensure their practice will thrive in the decades ahead.

Presentation overview

This presentation introduces specific knowledge building opportunities and a three-step service formula that advisors can follow to help them meet regulatory requirements while delivering a valuable and high impact customer experience that fosters loyalty, retains family wealth and earns valuable referrals. From understanding aging clients' values and motivations, demonstrating care as a professional, to implementing an engaging service offering, advisors and firms will walk away with clear steps, exciting ideas, resources and the know-how needed to start realigning their services and business practices for maximum impact and results.