FINANCIAL ALLIANCE NETWORK

Presents…

Purpose-Centered Insurance and Financial Life Planning
(8:30AM – 6:30 – lunch and *dinner included)
Choice of Two Days: May 13 or May 14, 2008
Location: New York Life Insurance MDRT Room
1330 Post Oak Blvd, Ste 1900
Houston, TX 77056
8 Hours CE pending. Submitted for TDI approval.

1-day Workshop Overview:

Two instructors will lead the seminar: Jim Munchbach, CFP®, ChFC, CPCU and Linda Miller, Master Certified Coach. Jim created the seminar based on his book, *What Matters Most*. Linda Miller, the Global Liaison for Coaching with The Ken Blanchard Companies, helped design the seminar. Both Jim and Linda have authored several books to promote superior client service. *Purpose-Centered Insurance and Financial Life Planning* is the result of a collaborative effort between The Ken Blanchard Companies and Financial Alliance Network, LLC.

The workshop focuses on the client's core values, purpose, and life goals. Advisors will gain skills, insight, and a working model for providing insurance and financial services in the context of everyday life. During the workshop, participants practice five core coaching skills while integrating the essential elements of financial planning with real-life case studies. The training is designed to equip Advisors with an effective template that can be duplicated in any client life planning scenario. The principles and absolutes related to trust building and relationship management are highlighted in each session.

Core Objectives for Insurance and Financial Advisors:

- Gain a working model that integrates the essential elements of financial planning with your clients' everyday life issues, concerns, and priorities
- Practice five core coaching skills that will improve your ability to build trust, manage relationships, and help clients reach their life goals
- Learn to connect your product solutions to the client's core values and purpose in the broader context of providing insurance and financial *life planning*

One Day Format (8:30 a.m.–5:00 p.m. *Dinner Q&A is optional for participants interested in follow-up coaching.)

- Welcome and Overview
- A Coach's Perspective on Advice Giving
- The Financial Life Planning Process, Perspective and Overview
- The Internal Gyroscope of Ethics and Purpose
- Five Core Coaching Skills – ELITE
  - Examine what you think, feel, and do as an Advisor.
  - Listen to learn what matters most.
  - Inquire for Core Values, Purpose, and Life Goals—Ask questions that promote discovery for your clients.
  - Test for Truth — Build trust and authenticity in relationships.
  - Endorse to Enroll, Energize, and Encourage—Acknowledge effort, values, purpose, goals and commitment using the client's language.

- Building a Purpose-Centered Alliance
- Learn to Read Your Clients – DISC
- Exercise to help you become more clear in your purpose
- *The Blueprint for Financial Success* – A Three Meeting Process
- Communication – Making the Complex Simple
- Presentation Skills – Connecting your products with clients' purpose

- Putting it all together – Prioritizing the Essential Elements of a Financial Life Plan
- About Post-training coaching sessions – Setting expectations and answering questions for the 3 follow up coaching sessions

Learning Modalities During Class

- **General approach to the training**
  We recognize that participants attending this training are already high functioning Financial Advisors who are using coaching and other related skills on a daily basis. For that reason, our approach is to create a collaborative learning environment where we sharpen each other's knowledge and skills. Depending on the conversations, we may go through the materials in a linear fashion or not. Our model is to present short segments to stimulate the conversation and then draw out the principles from the participants' experience. The Participant Workbooks are designed to sustain learning after the event.

- **Large and small group discussions**
  The quality of training is connected to the quality of the discussions among the participants. Our facilitator's primary role is to lead the discussions to a deeper level of learning. Interactive discussions are built into the training design.

- **Skill practices throughout the training with small groups of 2 or 3**
  Throughout the workshop, participants will practice coaching each other. Sometimes a third person (an observer) will give feedback to enhance learning. Participants will be invited to bring personal situations to the skill practices, thereby doing "real work" as they practice coaching and being coached.

- **Guarantee**
  We offer a money back guarantee for participants who are not satisfied with the workshop.

- **Customized scenarios for practice (optional)**
  We can work with organizations in advance to develop specific financial planning scenarios that reflect common situations and that provide a focus for discussions, demonstrations or skill practices, if desired.

- **Demonstrations with participants**
  As concepts are discussed, the facilitator may choose to demonstrate the skills or concept for the benefit of the group. All demonstrations are debriefed so that observations can be shared and discussed.

- **Coaching sessions**
  We recommend a minimum of 3 coaching sessions to maximize the learning. Research shows that training followed by coaching increases the level of skill retention after a training event. We believe that training followed by coaching turns a training event into a much deeper learning process, thereby leveraging the training costs. All coaching is confidential. Sessions are focused on applying coaching concepts to challenges and/or discussing areas of concern for the Advisor. Participants are carefully paired with a professionally trained coach. If desired, we can help develop internal coaches so that the coaching is done within your organization.

- **Cost and Registration**
  Visit www.FinancialAllianceNetwork.com to register today. Cost for workshop is $950 with three follow-up coaching sessions. Advisors can select workshop only for a cost of $250 which includes items shown below.