

'I-am-a-Successful-Financial-Advisor' Workshop

We are living in challenging financial times. Predicting the future accurately is a challenge.
Some financial advisors are massively successful, others are not? Is there a secret formula at play?
Proper alignment with clients is crucial to enable an abundant future.



Welcome to the “I Am Rex” Successful Financial Advisor Workshop, linking passion to business.

In this workshop, you will explore how to properly understand a client and meet them where they are at, then to take them where they need to be, in order to secure their financial future.

Listen & ask the key question

- ✓ Truly understand the client’s needs by asking the question “why invest?”

Reflect & direct

- ✓ Conduct a proper needs analysis using the vision jointly created with the client

Advice & Action

- ✓ Take the story created with the client and create the same vision using investment products in line with the vision

Further skills learnt:

- ✓ How to overcome objections
- ✓ How to be properly motivated
- ✓ How to deal with difficult clients

N.B.

It is recommended that this course is completed after the Foundation course, as this will provide the maximum benefit and effect.

Contact Rex, for a free introductory presentation to this life changing course material.

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www.IamRex.com

**IAMREX**
POWER IN THE PRESENT MOMENT