Pointers to Energize and Elevate Your Practice

Volume 1 and Volume 2 of our booklet series offers information to help you manage clients through market volatility, sustainable investment options, issues arising from aging parents, and more. Whatever your experience or client base, you'll learn ways to assist clients of all ages in their efforts to achieve a confident, comfortable retirement.

Receive the entire six-booklet set of the Volume 1 series. Topics include:

1. Tips to Build Your Brand along with a workbook to document your Brand Story
2. Creating a comprehensive client onboarding process
3. Avoiding common mistakes Financials Professionals make
4. Competing with Robo-Advisors
5. Answering common client questions regarding Social Security

Receive booklets 1 – 6 of Vol 2 on a monthly basis. Topics include:

1. Being mindful in your approach to continuing to build your business through client engagement
2. Managing client relationships through market volatility
3. Advising clients with aging parents
4. Sharing ways for clients to address college debt (their own or a family member's) while still saving for retirement
5. Understanding the evolution and growing popularity of sustainable investing, especially with millennials

6. Assessing Social Security and Medicare options clients will need to consider when they retire