Geared for Greatness

Welcome to your practice management pit stop—loaded with value add tools to help you connect with your clients, educate them on the long race toward retirement, and gear up your practice for success.

- **Client-Ready Seminars** – Presentation-ready PowerPoints designed to help you build trust, spark conversations, and generate leads.
- **Educational Brochures** – Clear, client-friendly explainers that take complex topics and put them into drive for better decision-making.
- **Sales Ideas** – Proven concepts to help you spot new opportunities and guide clients toward their financial finish line.
- **Referral Training** – Created specifically for advisors in financial institutions, we offer tools to help your frontline staff recognize and generate qualified referrals.

Practice Management Tools

Financial Wellness Seminars

These ready-made seminars, designed to be delivered in person or virtually, help clients tackle financial challenges and find savings opportunities throughout life’s stages.

View the Seminars >

Advisor Connect

Need a speaker for your company conference or event? Our Advisor Connect program offers engaging speakers who help your advisors put what they've learned to work as soon as they return to the office.

View the Brochure >

3 Greatest Challenges

This resource explores the three greatest challenges advisors face when working with clients—building trust, overcoming objections and rejections, and striking the right balance between technical expertise and clear, impactful communication—to help strengthen client relationships and drive better outcomes.

Download the Handout >

Leading a Family Meeting on Wealth Transfer

This guide equips advisors with strategies to facilitate productive family meetings on wealth transfer, helping clients navigate sensitive conversations, align family values with financial goals, and foster harmony across generations.

Download the Guide >

When Your Clients Divorce

This guide helps financial professionals support divorcing clients by clarifying key money matters and outlining the documentation needed for attorneys to address asset equalization.

Download the Guide >

Resources for Financial Institution Advisors

Scaling for Prosperity Referral Training

The presentation covers how to recognize strong prospects through life events and common financial questions, understand and address client concerns, and ask thoughtful, goal-oriented questions to connect clients with the right resources.

View the Seminar >

Engaging Clients in Savings Conversations

A guide for financial institution advisors that aims to enhance their ability to engage in conversations, including keywords to listen for and resources for anticipating and overcoming objections.

Download the Guide >

Scaling for Financial Security

This guidebook complements the Scaling for Prosperity Referral Training and helps financial institution advisors to anticipate, address, and overcome client concerns.

Download the Guidebook >

Related Resources

- Helping Your Clients with Their Retirement Accounts
- Introducing Annuities to Your Clients
- More Value Add Resources

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