The Client Acquisition Mastery Dojo Workshop February 2023

AdvisorRoadmap®
Virtual Training for Financial Advisors
Elevate Client Value. Grow Your Business. Be A Fiduciary.

Detailed Agenda
February 8th – 10th , 2023
San Diego, CA

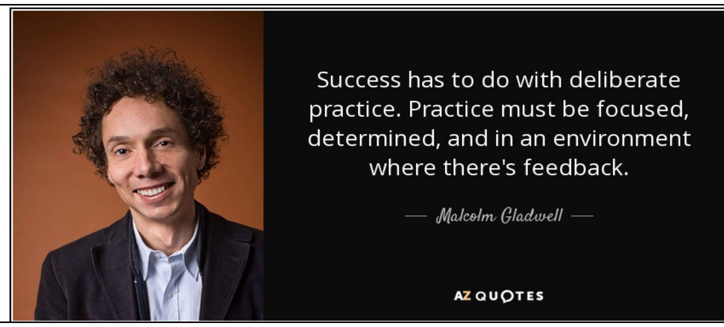
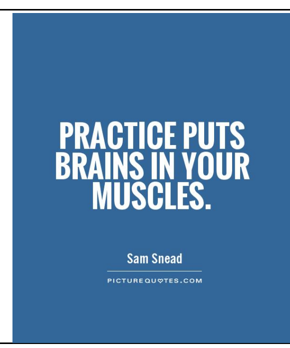
A Guided Practice Environment with like-minded, motivated financial professionals engaged in interactive, experiential learning to accelerate results.

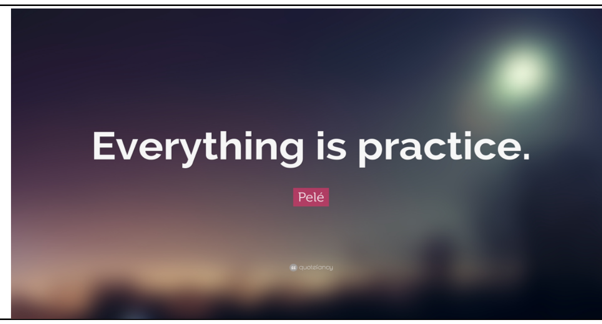
The promise of the Client Acquisition Mastery Dojo Workshop is simple: You will develop *more skill, more confidence, and more competence* with the 7 critical conversations and the Financial Road Map so you can more consistently and predictably acquire Ideal Clients (and Non-Ideal Clients if you still need them.)

You will get exactly that, and more.

The more you practice, the more success you will have. Whether practicing in a face-to-face or virtual environment, you will develop more competence that translates into better results in the real world**,** both **in** face-to-face and virtual meetings.

Register today at
www.youradvisorroadmap.com/dojo/
619-255-4888

Day 1; Wednesday, February 8th – *All Times U.S. Pacific Standard Time*	
7:00 - 7:45am	Registration & Breakfast
7:45am	Dojo Workshop Doors Open / Virtual Workshop Opens
7:55 - 9:15am  	Keynote Presentation by Bill Bachrach: **The Art & Science of Talking to Anyone, Anytime, Anywhere. Move the needle on the “trust dial” in the right direction, especially with the High Net-Worth.** Q&A. Preparing for Paired Practice.
9:15 - 9:30am Break	
9:30 - 10:45am 	**Paired Practice:** Critical Conversation #1 You will practice Crit Con #1 multiple times with different partners. As a result, you will develop more skill and confidence to engage new people you meet at charity events, on airplanes, at fundraisers, at weddings or any other place where a chance encounter could be the first step to your next Ideal Client. You will move the needle on the trust dial without ever coming across like a salesperson or typical financial advisor trolling for business. You can record your paired practice directly to your computer for future review and improvement. Coaching Tips + Q & A.
10:45 - 11:00am Break	

11:00am - 12:15pm 	**Paired Practice:** Critical Conversation #2 Also known as the "Phone Consultation." You will improve your skill at creating a phone or virtual meeting experience that results in scheduling more Financial Road Map interviews where people come to your office, with both spouses, and all of their financial documents. Coaching Tips + Q & A.
12:15 - 1:15pm	**Lunch**
1:15 – 2:30pm 	**Paired Practice:** Critical Conversation #3 – The Opening Conversation How you open the initial prospect or client interview is key to elevating your credibility, distinguishing yourself from other advisors, and paving the way for a positive experience. Do this well and you are more likely to be hired in this first meeting and clients are more likely to consolidate all of their business with you. This is where you start to shift investment-oriented client relationships to full-service financial planning relationships. Coaching Tips + Q&A.
2:30 - 2:45pm Break	
2:45 – 4:00pm 	**Paired Practice:** Critical Conversation #4 – The Values Conversation "What's important about money to you?" Values are the emotional "why" that inspire people to make their most important decisions. Like whether or not they are going to hire you, fire their other advisors, consolidate all of their business with you, follow your advice, and refer you to their friends. In this session you will practice asking the most engaging and emotionally compelling questions of each spouse / partner and really listen with true empathy in a way that continues to distinguish you from other advisors. Coaching Tips + Q & A.

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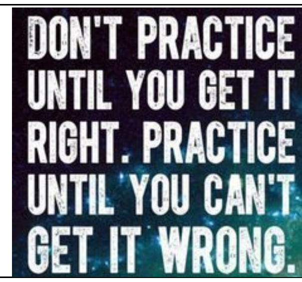
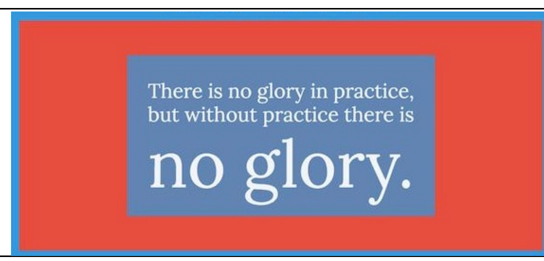
Day 2; Thursday, February 9th – *All Times U.S. Pacific Standard Time*	
7:00 - 7:45am	Breakfast & Pick Up Name Badge
7:45am	Dojo Workshop Doors Open / Virtual Workshop Opens
7:55 - 9:15am 	**Paired Practice:** Critical Conversation #4 – The Values Conversation with Pre-Commitment. By effectively summarizing the most deeply held values of each spouse / partner you create a compelling and inspiring vision of what a great advisor / client relationship looks like, sounds like, and feels like. As well as a strong sense of commitment that it's you they want this kind of relationship with. Coaching Tips + Q & A.
9:15 - 9:30am Break	
9:30 - 10:45am 	**Paired Practice:** Critical Conversation #5 – The Goals Conversation There's a lot of *talk* about "goals-based planning" these days, but most of it is pretty weak. The Values-Based Financial Planning goals conversation is much more personal, specific, and compelling than what is commonly used by most FAs. You can much more effectively inspire prospects to become clients and clients to act on your advice. Goals are the tangible "what" that complement the emotional "why" of their values. The combination of their most important goals and most deeply held values creates a powerful force to help your clients make the next smart choices about their money: to hire you and fire their current Financial Advisor(s). Coaching Tips + Q & A.
10:45 - 11:00am Break	
11:00am - 12:15pm	**Paired Practice:** Critical Conversation #6 – All The Money Conversation How to artfully handle the financial documents and benchmark their current financial reality in a way that increases your credibility, confirming their initial impressions of your competence and trustworthiness. Coaching Tips + Q & A.
12:15 - 1:15pm	**Lunch**

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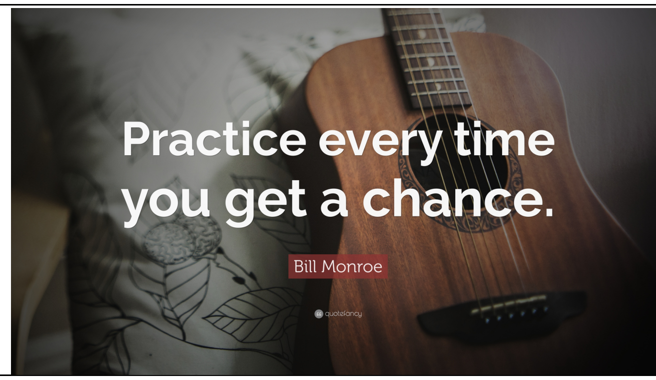
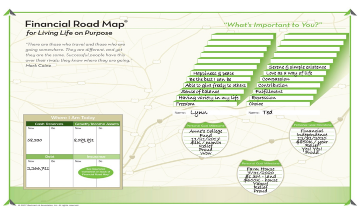
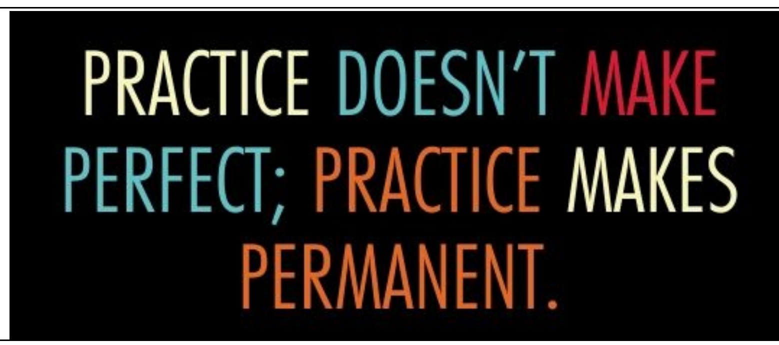
1:15 - 2:30pm 	**Paired Practice:** Putting it all together – Complete a full Financial Road Map Interview. Now you will practice the entire initial interview: The Opening, the Values Conversation, Goals Conversation, and the All the Money exercise put you in the perfect position to put an offer on the table to become their Trusted Advisor. Prospects will hire you in the first meeting and existing clients will upgrade by engaging in a full-service, planning relationship, consolidating all of their business with you. Coaching Tips + Q & A.
2:30 - 2:45pm Break	
2:45 - 4:00pm 	**Paired Practice:** Critical Conversation #7 – Commitment to Hire Powerfully articulate your client value promise. Now that your clients' values, goals, and current financial reality are laid out nicely in front of them on their Financial Road Map, it's time to put your offer on the table. You will practice articulating your client value promise in the context of their most important goals and most deeply held values and answering the two key questions, "how much does it cost?" and "what do I get?" You will be able to do this in a way that is totally transparent, is consistent with the fiduciary standard, and establishes clear expectations. Assuming they meet your Ideal Client Profile and you want them as a client, do this well and you are much more likely to hear, "let's get started now." Rather than, "we need to think it over." Coaching Tips + Q & A.

Day 3; Friday, February 10th – *All Times U.S. Pacific Standard Time*	
7:00 – 7:45am	Breakfast & Pick Up Name Badge
7:45am	Dojo Workshop Doors Open / Virtual Workshop Opens
7:55 - 9:15am 	**Paired Practice:** Putting it all together – Complete a full Financial Road Map Interview, including Commitment to Hire. Critical Conversations 3 – 7. Now you will practice the entire Financial Road Map Interview. The Opening, the Values Conversation, Goals Conversation, the All the Money exercise, and Commitment to Hire. Coaching Tips + Q & A
9:15 - 9:30am Break	
9:30 – 10:45am 	**Paired Practice:** Putting it all together – Complete a full Financial Road Map Interview, including Commitment to Hire. Critical Conversations 3 – 7. Now you will practice the entire Financial Road Map Interview. The Opening, the Values Conversation, Goals Conversation, the All the Money exercise, and Commitment to Hire. Coaching Tips + Q & A
10:45 - 11:00am Break	

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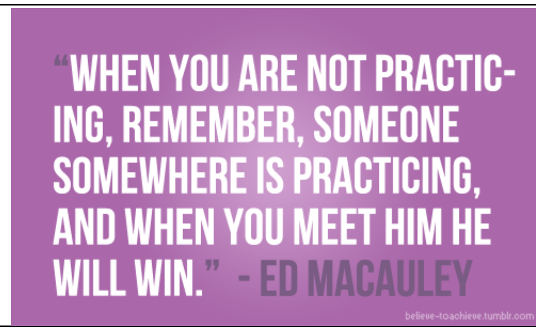
11:00am - 12:15pm	**Commitment To Hire and Focus on Developing & Articulating Your Client Value Promise.** Now that you've spent the last 2 and a half days mastering the Financial Road Map Interview, we'll be focused on the Commitment to Hire conversation and your Client Value Promise. This session will help you hear 'Yes' more often when you put your offer on the table to be hired. Q&A.
12:15 - 1:15pm	**Lunch**
1:15 - 2:30pm 	Keynote Presentation by Anne Bachrach, THE Accountability Coach™: **Proven Systems for Making More Money, Working Less, and Enjoying Better Work Life Balance.** As the personal Accountability Coach for the Committed Advisors and the leader of the Accountability Groups, Anne knows exactly what you need to do in order to maximize your results. Q&A.
2:30 - 2:45pm Break	
2:45 – 4:00pm	Q&A. Before you're done you want to make sure you have the answers to all your burning questions. This is the "catch-all" place to ask all the questions you haven't had the chance to get answered. Commitment to Implement exercise. Closing remarks.

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