

ADVANCED SKILLS CERTIFICATION: CINCINNATI

2019

PROGRAM DESCRIPTION

Advanced Skills Certification is designed to help advisors become proficient in a new sales methodology relevant for today's culture. This training guides advisors to effectively differentiate themselves by redefining their role, employing a coaching-centric methodology, and collaborating with different professional service providers. This certification will also assist reps on how to utilize Network resources to develop their current practices.



Hosted at:

Horter Investment Management
11726 Seven Gables Rd
Cincinnati, OH 45249

WWW.ADVISORPLUSNETWORK.COM



QUESTIONS? CONTACT US AT SUPPORT@ADVISORPLUSNETWORK.COM

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COURSE SCHEDULE

DAY 1

Topics Covered:

Differentiating Yourself

- Five Elements of Leveraging*
- Redefining Your Role as an Advisor*
- Collaborative Opportunities*
- Choosing Your Specialties*

Collaborating with CPAs, Accountants, and other Professional Service Providers

- Common Goals: Adding Value through Coaching Methodologies, Increasing Efficiencies, and Enhanced Quality of Life*
- Understanding the Challenges Facing CPAs today*
- Wealth Management Oversight*

DAY 2

Topics Covered:

Financial Planning vs. Financial Coaching

- Tactical Financial Planning*
- Money Management: Advanced Planning Group*

Horter Tactical Management Investment Systems

- Forward-Looking Due Diligence*
- Tactical Styles and Trend Aggregation*
- Horter TAMP*

Successful Selling Systems

- Getting Other Professional Service Firms Started in Wealth Management*
- Effective Guidelines for Prospecting, Selling, and Closing*

DAY 3

Topics Covered:

Utilizing Network Resources

- Continuing Education and Training*
- Network Programs, Open Offices, and Discussion Forums*
- Coaching Deliverables*
- How to Leverage Yourself*

#1 Ingredient for Success Today

- Developing Success and Creating New Habits*

Asset Protection

Client Service System

Developing Your Practice

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