

Room Setup

Small things make Big differences:

6 ft table with branded cloth and someone to check in guests.

Table in the back of the room that holds the drinks/pub subs/chips.

Check out the supply list (small things like tongs for the subs).

Disconnect PC from wifi (no popups).

Response Form:

- Most critical aspect of presentation is having attendees SELF DISCOVER that they need HELP. Our response form helps align your firm for the first meeting. We are not asking them to book a meeting – we are offering them a no cost evaluation IF they have areas that are of concern.
- 6 critical retirement concerns – go through each one.
- IF there are areas of concern – meet with someone our team is able to do a no cost evaluation – what does that look like.
- TELL them what to do. Do not ASK

Presentation Pointers

- How fast do you talk? 150 words per minute is the “sweet spot”
- Use stories where you can – they don’t have to be YOUR stories.
- Be Authentic – great converting speakers all not all the same. We have seen incredible results from high energy entertainers to more monotone educators.
- Always reiterate that the strategies discussed are just the tip of the iceberg when it comes to available strategies for the topic. The class is designed to provide a better high level understanding of the IMPACT said topic can have on someones long term success...

Presentation pointers continued

- Tie it back to why it matters continually.. You don't want to give the IRS more of your money than you have to, you don't want to lay awake at night worrying about your financial security when your too old to go back to work...
- This is NOT an opportunity to expound on the abilities of you or your firm. The goal is not to tell them they have a problem or tell them that you can fix the problem. The GOAL is to have them either self realize they may have areas they missed or to realize that an advisor (most have one) should be talking about this!

Presentation pointers continued

- We have found that the sweet spot for presentation length is between just over an hour and no more than an hour and a half. Compared to dinner seminars you have more of their attention for longer.
- Initial advice is to ask participants to hold questions until the end – we tell them to write the questions down to cover after the presentation. Some prefer to accept questions during the event – the challenge is comfortably shutting down a question that is too personal here is language that we use:
- “thank you for that question” – it’s a great question. It is also one that is more specific to your situation – let me talk with about that off line so that we maintain your privacy – I’d have some follow up questions that wouldn’t be appropriate to ask here”.

Presentation pointers continued

- We don't want to fully answer any questions during or after the event of personal nature. We are not trying to provide free financial planning specific to their situation – that's why we offer an evaluation. “As a fiduciary we can't give you specific advice or answers to your personal question unless our team review your situation – as you probably saw from the class today – there isn't normally a good “rule of thumb” –everyone is different.