

Overview

****The ideal leader for this module** is a Sales Cycle Mastery/Summit graduate who *is using the Financial Security Checklist in his/her practice.*

The module is designed to give you a vision for how you will work with clients over time, and a game-changer tool that Jim introduces as part of his teaching on how to conduct a highly effective annual review with existing clients. You can use it today to help evaluate your own progress toward financial security for yourself and your family.

****Print a copy of the Sample Financial Security Checklist for each advisor, or have them access the Launch site during the session on their device.**



This module is
focused on Beliefs.



Facilitator Pre-Work

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It is critically important that you carve out 20-30 min. of time prior to leading a Launch session to do the following:

- 1) Review the Guide below.
- 2) Watch the videos from the PRIOR MODULE (so you are prepared to lead the Homework Debrief), as well as the videos from THIS MODULE.



Review

Review Homework from Previous Module

Ask each advisor to share their % of billable hours from the prior week. Discuss how they feel about where this number is today, and how they will continue to track and monitor this % going forward. Lastly, have each advisor share the ONE THING they are working on to increase that number over time.



Watch

Watch the Module 20 Videos (approx. 4 min. total)

- 1) The Financial Security Checklist
- 2) Sample Financial Security Checklist



Discuss

Questions/Topics to Create Discussion/Dialogue

- Talk about how you have worked with your clients in the annual review process to help them make continuous progress over the years toward their goal of financial security. What have been some of your biggest successes or challenges that you've learned from?
- If you use a Financial Security Checklist, demonstrate how you use it with your clients.
- Walk through each of the items on the Checklist to give an overview of each and allow the group to ask questions.



Role Play

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Put the advisors into pairs. Each pair should take turns talking through their own progress on each of the items on the Checklist. Where are their current strengths? What is their greatest concern for their own family/situation today? The partner should ask questions to draw out what is most important to them.

Conclude by asking for volunteers to share their "a-ha's" and/or action items based on this conversation.



Assign

Assign Homework

As advisors, we must work to ensure we are leading by example in our own personal financial situation. Share the Financial Security Checklist with your spouse/partner and talk about what steps you need to take. If you have an advisor, share and discuss with him/her, as well.



Attention Trainers: We need your feedback!
Let us know if this was a ***** module, or if you found discussion harder to generate than other modules. If you find an error, or if you have any ideas to make this module better – please reach out! Info@JimEffner.com