

Overview

Delayed gratification is not easy. That is why the role of the rep is so significant. As an advisor, you must work to manage human behavior. Your job is to help bring the future to the present and bring a sense of urgency to saving money and planning.



This module is focused on Beliefs and includes content that is purposefully repeated in the one-year Launch curriculum.



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 for a volunteer or select an advisor to role play the "retirement engine" language they were to use this past week as they opened up the retirement section of their FFs. Give feedback. Then, ask multiple advisors to share how they felt this language impacted their retirement discussions in their FFs.

Ask for another volunteer or select someone else to role play the "stuff syndrome story" Jim uses as an "arrow in the quiver" when needed to help a prospect see the importance of starting now. Ask if anyone had the opportunity to use this story in their FFs this past week and if so – what was the result?



Watch

Watch the Module 31 Videos (approx. 8 min. total)

- 1) Understanding Behavior
- 2) A Financial Planning Journey
- 3) Saving Money and Planning



Discuss

Questions/Topics to Create Discussion/Dialogue

Your beliefs drive your behaviors. As new advisors, one of the most important things you can do to set yourself on a path for success is to build or strengthen your own disciplined financial habits.

- Talk about your own financial journey – the things you feel you've done well and the things you look back on and wish you would have done differently.
- Ask for volunteers to share their thoughts/reactions to the videos. What came to mind about their own financial behaviors, and what they've learned from their parents about money? What are their current financial habits and how do they feel about them? What do they need to address immediately or begin to do differently?



Role Play

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Ask for a volunteer to come forward and role play. You will play the role of advisor and they are the client. Ask them the questions you typically ask in a FF to understand their current balance sheet / savings habits. They should play the role of someone who has NOT built good habits. Your job is to demonstrate how you challenge in a way that builds your relationship and helps them think differently about how they approaching their financial path.



Assign

Assign Homework

- 1) Remind the group that their beliefs and conviction around the right way to build a financial future are strengthened by what they see, hear and read. They should watch this week's videos at least 2 more times in the coming week.
- 2) Commit to ONE THING you will do (and by when) to strengthen your own financial future, and share it with your trusted advisor.
**If they do not have their own advisor they are working with, they should identify who they want to work with and set up a meeting with them.



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

Attention Trainers: We need your feedback!