EVOKE® Life Planning Training:
Applying EVOKE® Life Planning Methodology to Client Engagements

Provides 10 CEUs for CFP®s
Eligible for CPD Points – 42 hours

- **Workshop calendar available at www.kinderinstitute.com/events**

In this intensive 5-day residential training you will experience first-hand the power of Life Planning to create breakthrough results with your clients. Through our signature EVOKE® process—a methodology that takes clients through a five-stage interview process—client trust is built immediately, often in the first five minutes of client engagement. Clients understand they will achieve goals that no other advisor has been able to deliver in the form of a comprehensive and highly tailored plan of action. You will uncover your clients' most exciting, meaningful, and fulfilling aspirations and engage them in the work of creating their own vibrant futures, based on a solid financial architecture. It will transform the way you deliver advice to clients – and make them clients for life!

Central to the training is the development of your own Life Plan. Learn to Life Plan a partner and, in turn, be Life Planned. You will emerge inspired to live your own life to the fullest with processes and structures in place to insure you achieve your goals and with the language and skills to inspire your clients to do the same.

The Future is Life Planning

Developing this kind of client relationship skill—what we call financial Life Planning—is the future of the advisory profession. This training is an important step toward a completely fresh approach to engaging clients, one that focuses first on the person, not their portfolio. Go beyond investment management. Financial Life Planning will differentiate you from the crowd and help build unbreakable trust with your clients.

> **"The 5 day advanced course was without doubt the most exhilarating and soul-enlightening experience I have had of any financial planning courses since I started in this industry 18 years ago. It showed me what true financial life planning is and that it is a fundamental part of the planning process."**

Michael Aitken, RLP®, Founder & Director
Magus Financial Management Limited

Advisors benefit through the Client Relationship Dividend

- Because of the depth, personal nature and precision of the goal process, it is the most efficient way to do financial planning, without the risk of surprises, backtracking or resistance
- Build deeper, longer-lasting relationships with clients, becoming a trusted adviser
- Income stream becomes automatic rather than constant selling
- Greater client retention, fewer sales
- Attract higher percentage of AUM, generally moving from 15-45% to 80-100%
- Receive stronger, warmer referrals
- Closing ratios much higher, moving from 25% to 80%
- Close clients in first meeting
- Referrals after first meeting
- Create business skills that are transferable, trainable, scalable and saleable
- Achieve valuation levels 4-5 times the sale value of commission-based practices
- Experience energized clients, re-energized advisors

You will learn

- To practice through repetition and observation every detail of the five-phase EVOKE® interview process
- Access clients' deeply held personal aspirations—even those that are closely guarded
- Collaborate in the articulation of a life vision
- Address key obstacles to attainment of long-desired goals
- Integrate the life vision with practical financial strategies
- Overcome resistance to plan execution

Who should attend? Advisors who...

- Want the strongest possible financial advisory business
- Believe authentic relationships are the key to healthy and thriving businesses
- Want to help their clients re-connect to their core aspirations and live their most fulfilled and energized lives
- Want to learn the Kinder Institute's time tested method, used by thousands of successful advisors worldwide

"I learned more in 5 days than in the last 15 years. The Financial Life Planning approach is, in my view, the only way to interview clients."

Dante Peters, RLP®
Director, Magus Financial Management Limited

Life Planning Advanced Training Structure

- Small workshop size – maximum of 14 participants
- One trainer for every 7 -8 attendees
- Largely experiential
- Advisors choose partners and Life Plan each other throughout the workshop
- Goals are identified, sorted, prioritized for inspiration level, time-lined and then assessed for potential obstacles and financial implications
- Participants practice the interview process with each other and receive personal coaching after each exercise
- Participants also observe all other participants practice and receive coaching—approximately 20 different coaching interactions that build a wealth of practical knowledge
- An additional half-day is spent on basic client interviewing principles, the dynamics of working with couples and families, and conflict resolution
- Another half-day is devoted to practice management guidance related to integrating a Life Planning approach into an existing practice
- Workshop is followed by an optional 6-month on-line or live case study Mentorship with a senior teacher so participants can practice and receive ongoing coaching during the implementation of EVOKE® in their businesses

- **Book now to reserve your spot**
- **Workshop calendar available at www.kinderinstitute.com/events**

Graduates of this program consistently rate the EVOKE® Life Planning Training as one of the most transformative experiences of their lives, and then they make that happen for their clients as well, not just their businesses.

If you want to do more for your clients; if you want more satisfaction and ease in your life and business, join us! The experience will be unforgettable.

"Without question this is the most profound experience an advisor can provide their client or can experience themselves. Providing financial planning services without first life planning the client can leave a gaping hole in the client's life. To truly deliver exceptional planning, one must integrate the client's deepest life goals with their financial goals and resources."

William Jordan, President
The Sentinel Group Inc.

"It's helped me both personally and professionally. Doing your own life plan is a great help, as is having your own planner. Professionally, the benefits are enormous. In particular, becoming a life planner:

- **Marketing: helps you provide clients with precisely what they want – someone to listen to them and to take a grand overview of their affairs (see an article on my blog on my website "The Freedom Trend"**
- **Organizational: EVOKE is a process, which can be easily built into an existing practice**
- **Pricing: allows you to charge on a pure fee basis (and ultimately to move away from dealing with products entirely)**
- **Compliance: there is no better way of providing appropriate advice – and proving it**
- **Sales: your rewritten elevator pitch will be stunning and after your initial presentation to new clients you will get a near 100% conversion rate**
- **Really interesting and nice people become clients"**

Jeremy Deedes, MBA, MPFS, CFP®, FIFP, RLP® Planning for Life LTD

"A brilliantly conceived and masterfully delivered training process that enables advisors to help their clients truly achieve their most cherished goals."

Jeff Arsenault CPA/PFS, CFP®, MST, RLP®
New Wealth Advisors

"Kinder's Life Planning process has made such a positive impact on me personally, I'd be foolish not to roll it out to my clients."

Lawrence J. Annello, CPA/PFS, CFP®, RLP®
Managing Director, DHAS Financial Planning, LLC
