The Seven Stages of Money Maturity® Workshop:
A Model for Understanding and Developing Client Relationships

- **Provides 10 CEUs for CFP®s**
- **Schedule: 8:45 am to 5:30 pm both days**

- **To book use this link - www.kinderinstitute.com/events**

This workshop will teach advisers to help their clients find freedom and financial security by developing clarity and ease around their relationship to money. The Kinder Institute's tested method is used by thousands of successful advisors worldwide. Improve your ability to inspire clients to action toward their goals and establish broader and deeper relationships with your clients, making them *clients for life*.

Location/Date:

You will learn:

- How to integrate life goals with financial realities
- How unexamined beliefs about money disrupt the advisory process—and what to do about it
- Learn to recognize the human dimensions of money such as self-sabotaging behavior, inappropriate risk-taking, lack of interest in executing a plan, and goal confusion—and how to address them
- How to use our famous "Three Questions" methodology to connect to clients' deeper goals—even those that may be closely guarded
- The workshop includes nearly a dozen experiential exercises, practice with three key written exercises you can use with clients, and a 3 hour practical introduction to the 5-stage EVOKE® client interview process that is more fully elaborated in our 5-day Advanced Training

Adviser benefits:

- Enhances the ability of the advisor to empathize with the client, building trust
- Improves the ability of the advisor to inspire the client to action toward their goals and toward financial action
- Includes listening, empathy and goal exercises
- Gives the advisor a philosophical and psychological framework to understand client behavior
- Increase closing ratios—fewer wasted opportunities
- Get effortless referrals—even after the first meeting!
- Build assets under management and planning revenue from all your clients

> **"Life Planning has been the key to a wholesale change in my business, my clients, my staff, and my family that has meant both more money and more personal satisfaction. I can't recommend the Kinder trainings more highly."** – Adam Young, Dragonfly Planning

Who should attend? Advisors who…

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

"The Life Planning process is the missing link between clients unspoken dreams and desires and the financial planning process. Without it the advisor cannot be sure how valuable the planning work has been to the client." – James Brooke, Altior Vita LLP

"If you want to bring your IFA business into the 21st century you owe it to your clients, but more importantly to yourself, to attend the Seven Stages workshop." – Rajesh Modha, The Financial Lab Ltd

"George brings a mélange of knowledge, experience, humor, humility, erudition and stories to teach and empower us to empower our clients." – Curt Weil, The Lasecke Weil Wealth Advisory Group, LLC

More ...

Money—The Last Taboo

People will discuss their work, their kids, their parents. They'll even disclose problems they may be having in their marriages or with their health. But rarely do they talk about the one thing we all have in common—MONEY. It's what supports all of us. Yet, it's the last great taboo. How many of us have hesitated to talk about financial issues with our own spouse? Even when a client talks with a financial advisor, they often don't dare to articulate what they really want to get out of life and how they would like their money to support them. Why?

In **The Seven Stages of Money Maturity**® 2-day workshop we train financial advisors to explore this unexamined territory. Where do beliefs about money come from? Why do clients keep them so private? Why are they so persistent even when they are painfully counter-productive? How can advisors sensitively and professionally help clients bring to the surface their closely-guarded dreams and aspirations? <u>With the Kinder Institute's Seven Stages and EVOKE® models advisors are able to do just this.</u>

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. And this workshop is one step toward developing a completely fresh approach to engaging clients, one that focuses first on the person, not their portfolio. Of course, we need to develop solid financial strategies for our clients. But first, we must understand what money is for. If we truly connect to a client's deepest dreams and aspirations and can fashion plans in their service, we will earn clients for life.

This is the future. Go beyond investment management. Financial Life Planning will differentiate you from the crowd and help build unbreakable trust with your clients.

"A truly worthwhile experience. This two-day session has been illuminating! I look forward to future seminars." – Laurie Chandler, Vigilant Capital Management, LLC

"Simply the most enlightening course available for planners today. A must!" – Keith Long, Paramount Group Ltd

"The 2-day Money Maturity seminar has thankfully helped me nail down my true mission and vision in my business after many years of struggling with this. I look forward to the 5-Day EVOKE® seminar both for my personal benefit and to firmly establish how to incorporate Life Planning in my practice." – Robin Rogers Smith, Robin Rogers LLC

"Thought provoking! It will change your life!"
– Frans Duynstee, Resultforce Consultancy

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