

Wealth Enhancement Process[®] Coaching Services *Designed to Help You Implement*

WEALTH ENHANCEMENT PROCESS[®] COACHING SERVICES

Does this sound familiar . . . You attend a conference or seminar and return to the office with your seminar folder tucked under your arm, and your mind filled with good intentions. Only to find a week later you are back in the same routine, and the folder filed in your desk drawer. We've all been there. Did you know that 75% of CEO failures in the U.S. were due to failure to execute?

DEVELOPING A PLAN TO IMPLEMENT

During the Fine Tuning Your Success Plan module of our 2.5-day Workshop we help you write an Action Plan that's designed to implement the Wealth Enhancement Process[®] financial advisory model in your practice. This action plan looks forward at least a year, and is based on your desired outcomes such as increased assets under administration, insurance placement, fees, deepening client relationships, whatever you decide is most important for your business—Return On Investment factors (ROI). The action plan is also designed to help you increase other critical aspects of your life such as time with family, church life, education, or hobbies—what we call Return On Life[™] factors (ROL). You are now armed with an action plan designed to increase your desired outcomes for ROI and ROL. However, we could all use a little help sometimes.

COACHING DESIGNED TO HELP YOU IMPLEMENT

We deliver implementation coaching. We help you work through the action plan you developed in the Workshop to achieve your specific objectives. An important aspect of these calls is to hold you accountable for working through the pre-determined action steps necessary to reach your goals. Remember, 75% of CEOs fail due to lack of execution. Our Wealth Enhancement Process[®] coaching helps you execute your action plan and helps drive your success.

We coach in small groups as well as one-on-one. In the small group format you can hear first-hand the roadblocks facing your colleagues. In many instances others have already worked through what might be bogging you down. You can learn from their experience. You have the opportunity to develop friendships and business relationships with others who are speaking the same "language" as you—the Wealth Enhancement Process[®]. A critical aspect to the group work is the individual assignments. These assignments are designed to hold you accountable for your success. Our coaching tools help you report progress and keep you on track.



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WHO NEEDS COACHING

Believe it or not sports celebrities didn't learn everything on their own: Tiger Woods has four coaches.

Luciano Pavarotti has coaches for acting, voice, music, language, and personal fitness. You may think Pavarotti hasn't benefited much from his coaching in the fitness category. Then you might realize he wears 50-100 pounds of costume, sings for 2 hours, and raises his voice to be heard in perfect pitch without amplification by 5,000 people. He does all this while acting in a very demanding role, frequently in a language other than his native Italian. Personal coaching took Luciano from just a good voice to legendary operatic status.

Ten years ago coaching for financial advisors was relatively uncommon. During this time financial advisors have discovered the benefits of personal coaching. What we have found is:

- Very few financial advisors are dissatisfied with their coaching experience;
- Many report truly dramatic results, both in business revenue and in their personal lives; and
- Quite a number have used multiple coaches to focus on different areas.

WHAT IS THE COACHING EXPERIENCE

Coaching As Relationship

Coaching is a relationship between you and your coach, who is dedicated to helping you achieve your goals. It is a partnership that involves self-honest assessment, learning, support, challenge, constructive action, and personal accountability.

Coaching As Process

Coaching is a process designed to facilitate change. The coaching process supports change through learning, action, feedback, and reflection.

Coaching As Conversation

Coaching takes form through conversation. Coaching conversations create clarity, explore possibilities, set goals, design actions, evaluate feedback, and help you gain time to reflect.

WHAT HAPPENS WHEN YOU HIRE A COACH

- When performance is measured and then reported – your rate of improvement accelerates
- You take yourself more seriously
- Your actions are more focused, effective and tangible
- You create momentum so that it is easier to get results
- You set better goals that are more in line with what you want

YOUR COACHING PROGRAM HAS THREE KEY COMPONENTS TO HELP YOU SUCCEED

Impact Calls

We deliver implementation coaching. Scheduled 30 - 45 minute conference calls with your coach twice a month. We help you work through the action plan you developed in the Workshop. We help you implement the Wealth Enhancement Process® in your practice and to achieve your specific objectives. An important aspect of these calls is to hold you accountable for working through the pre-determined action steps necessary to reach your goals.

Focus Calls

These are 1-hour conference calls hosted by an expert on a specific aspect of the Wealth Enhancement Process® or the infrastructure necessary to support the process. The idea is to learn from experts, get feedback from members, as well as to answer your questions. There are four to six focus calls per year.

Consultancy

Your coach will also facilitate up to four hours annually of consultancy on a variety of topics, including technology, operations, financial management or marketing. This one-on-one coaching is also conducted via telephone. Where necessary your coach arranges sessions with some of our key strategic partners. This way we can help you work through issues that are specific to your business.



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