Next Chapter Lifestyle Advisor Program

What it is: A value-added program to enhance financial advisors' efforts to deepen their relationship with current clients and differentiate their practice to attract new clients.

The financial advisory industry is changing dramatically and so are the needs of its most important clients - Baby Boomers.

- Advisors need to add new services to differentiate themselves.

- Retiring Boomers need help planning more than just their finances for their new life. They need to plan how to invest their time so they feel their new life is fun and fulfilling.

77% of those planning to retire wish *"there were more resources available to help them plan for an ideal retirement beyond just their finances*" according to the Edward Jones/AgeWave study, "The Four Pillars of the New Retirement," that was just named First Place Winner of the 2021 Wealth Management.com Industry Awards for its "outstanding thought leadership."

And people are looking to their financial advisor to provide those resources.

This program gives advisors the tools, training, and support they need to provide retiring clients with the resources they want to design the next chapter of their life so you can ensure their financial plan will support it.

How advisors will benefit: It is an opportunity for you to strengthen client retention and increase new client acquisition.

The need for this service is just emerging and advisors who embrace the opportunity to offer it will be seen as innovators and leading-edge thinkers. You can use it to differentiate yourself by offering a service your valuable clients say they need. That is a powerful message which demonstrates to prospective clients that what you offer is more valuable than competitors' service. It also reinforces current clients' commitment to you.

This program will give you a first-mover advantage.

What it includes: Access to thousands of dollars' worth of tools, training, and support

- Training and use of Next Chapter Lifestyle Scorecard™
    - The scorecard is a proven tool to deepen the conversation about client's plans for their next chapter in a way that is different from, yet complimentary to the conversations about money.

- Happiness Portfolio® Workbook
  - Your Happiness Portfolio® is a vision and action plan for eight essential non-financial areas of your life: Professional, Primary Relationship, Family and Friends, Giving Back, Health and Wellness, Leisure, Self-Development, and Emotional and Spiritual Well-Being.
  - The workbook is a self-paced tool for clients to create a clear picture of what they want in their Next Chapter.
- Educational presentation for you to use to explain the benefits of lifestyle planning to clients and prospects
- Retirement Intelligence Assessment (RQ)
  - Retirement Intelligence is a new, comprehensive measure of retirement readiness. It is a landmark approach to assessing personal retirement readiness.

    It provides insight and context for transitioning a person's current thoughts, feelings, and behaviors into their new retirement reality and addresses any disconnects that may arise.
- Ask a Retirement Coach support for your clients
  - Advisors do not have either the time or the training to be an expert in retirement lifestyle issues. Just as you reach out to specialists like accountants and attorneys for assistance with your client's tax and estate issues, we are there for you and your clients to answer their lifestyle questions.
  - Ask a Retirement Coach calls are free 30-minute opportunities for your clients to speak to a certified retirement lifestyle coach to get answers to questions they are struggling with about their life in retirement.
  - When a client needs more support, we can provide a deeper consulting program tailored to meet their specific needs.
- Monthly articles for your newsletter, to send to your list, or to post on your website
  - The topics are about the things people struggle with as they move into their next chapter.
- Monthly First Movers Roundtable
  - The monthly First Movers' Roundtable calls are an opportunity to share your experiences, learn from the successes and challenges of your fellow First Movers, hear from topic specific experts, and enjoy the comradery of like-minded advisors.

- Unlimited calls with Susan and Marianne to answer your questions about the program or your concerns about your clients
    - Think of us as part of your team. We are there to support you with your questions and ideas about ways to use this service as well as any issues about what your clients might be going through.

- Include Susan's and Marianne's bios on your website as support staff
    - By posting our bios on your website, you will demonstrate to your clients that these are not just empty words because you have experts working closely with you to deliver this highly valuable service.

- 50% discount on each of five client education webinars
    - We know from the Edward Jones/AgeWave study that people do not know where to find the resources they need to plan the next chapter of their life. To position you as a leading-edge advisor who has the resources they need, we have developed a series of educational webinars we present at your client events. Each one addresses a different aspect of designing a fun and fulfilling new life.
        - 3 Secrets to a Happy Retirement
        - Retirement Planning – The Unique Issues Women Faced
        - Retirement and Your Relationship – How to Keep Retirement from Ruining It
        - Retirement Challenges of High Achievers
        - Fundamentals of Retirement Lifestyle Planning

- Resource list to support clients
    - We give you a curated reading list and directory of websites where clients can find valuable information

- Access to advisor education courses on the topic of retirement lifestyle planning
    - To help you increase your understanding of the importance of this service and the issues your clients face as they transition into retirement, you will have free access to two online seminars:
        - The Strategic Value of Non-Financial Lifestyle Planning and How it Can Grow Your Financial Advisory Business
        - Help Clients Transition Smoothly into their Retirement Lifestyle

Fee: $197per month

To learn more, click on this link to book a call with us.

[Book a call]