As the Wealth Management Industry goes **HIGH-TECH** Advisors need to go **HIGH-TOUCH**

In the ever-evolving landscape of wealth management, the shift towards high-tech solutions is undeniable. However, what truly sets exceptional advisors apart is their ability to complement technology with a human touch. This forward-looking and eye-opening program is specifically designed to transform participants from being focused only on the money to incorporating a high-touch approach in their practice.

Through a combination of thought-provoking discussions, real-life case studies, and interactive exercises, this program will change your mindset and differentiate you from other advisors in the industry today. You'll gain a deep understanding of the pivotal role that high-touch engagement plays in fostering meaningful client relationships and enable you to attract and retain the best-fit clients for your wealth practice. You will gain the ability to identify situations where your clients will benefit from having non-financial conversations, confidently initiate and navigate discussions about the softer aspects of your clients' lives and guide them to the appropriate resources to address their non-financial needs.

Through this session, you will:

1. Recognize the Significance of High-Touch Engagement: Develop a deep understanding of the importance of high-touch engagement in the wealth management industry.
2. Identify Client Needs: Gain the skills to identify specific situations where clients will benefit from non-financial conversations.
3. Confidence in Discussing Personal Matters: Confidently initiate and navigate conversations about the soft side of your clients' lives, building stronger relationships in the process.
4. Guide Clients Towards Resources: Learn effective strategies to guide clients towards resources that can address their non-financial needs.
5. Transform Your Practice Through Values Alignment: Transform your practice by incorporating a high-touch approach, attracting and retaining the right clients who align with their values and goals.

Join this transformative program and unlock the potential of high-touch differentiation in the wealth management industry. Embrace the power of meaningful client relationships and elevate your practice to new heights.

Audiences
Financial advisors, financial planners, wealth advisors

Program Length
Customized for 60-minute keynote or breakout session or half-day interactive workshop

Other
Approved for CFP Board Continuing Education (CE) credit

Susan Latremoille, FEA, CPRC
susan@nextchapterlifestyleadvisors.com
https://nextchapterlifestyleadvisors.com

NEXT CHAPTER
LIFESTYLE ADVISORS