

## MODULE 1

# Why the Best Are the Best



ADVISOR ADVANCEMENT INSTITUTE



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# Why are the best the best?

- They think beyond the balance sheet – offering holistic care that leads to growth
- They act as a partner to help their clients achieve their family, lifestyles, career, and health goals
- They derive satisfaction from impacting people's lives
- They know their role is more similar to a life coach, than someone who manages money
- They take a broader, multi-generational, and inclusive view to helping their clients' families

Now that you’ve taken the quiz, it’s a good moment to reflect on what you want to get out of this program.

Use this worksheet to consider the following prompts, and reflect on areas you’d like to improve.

<div>Where I Scored Highest</div> <div></div> <div></div> <div></div>	<div>Where I Scored Lowest</div> <div></div> <div></div> <div></div>
<div>Why I Think I Scored High</div> <div></div> <div></div> <div></div>	<div>Why I Think I Scored Low</div> <div></div> <div></div> <div></div>
<div>Write out 2-3 behaviors that will help you build this area:</div> <div></div> <div></div> <div></div>	<div>Write out 2-3 behaviors that will help you improve this area:</div> <div></div> <div></div> <div></div>

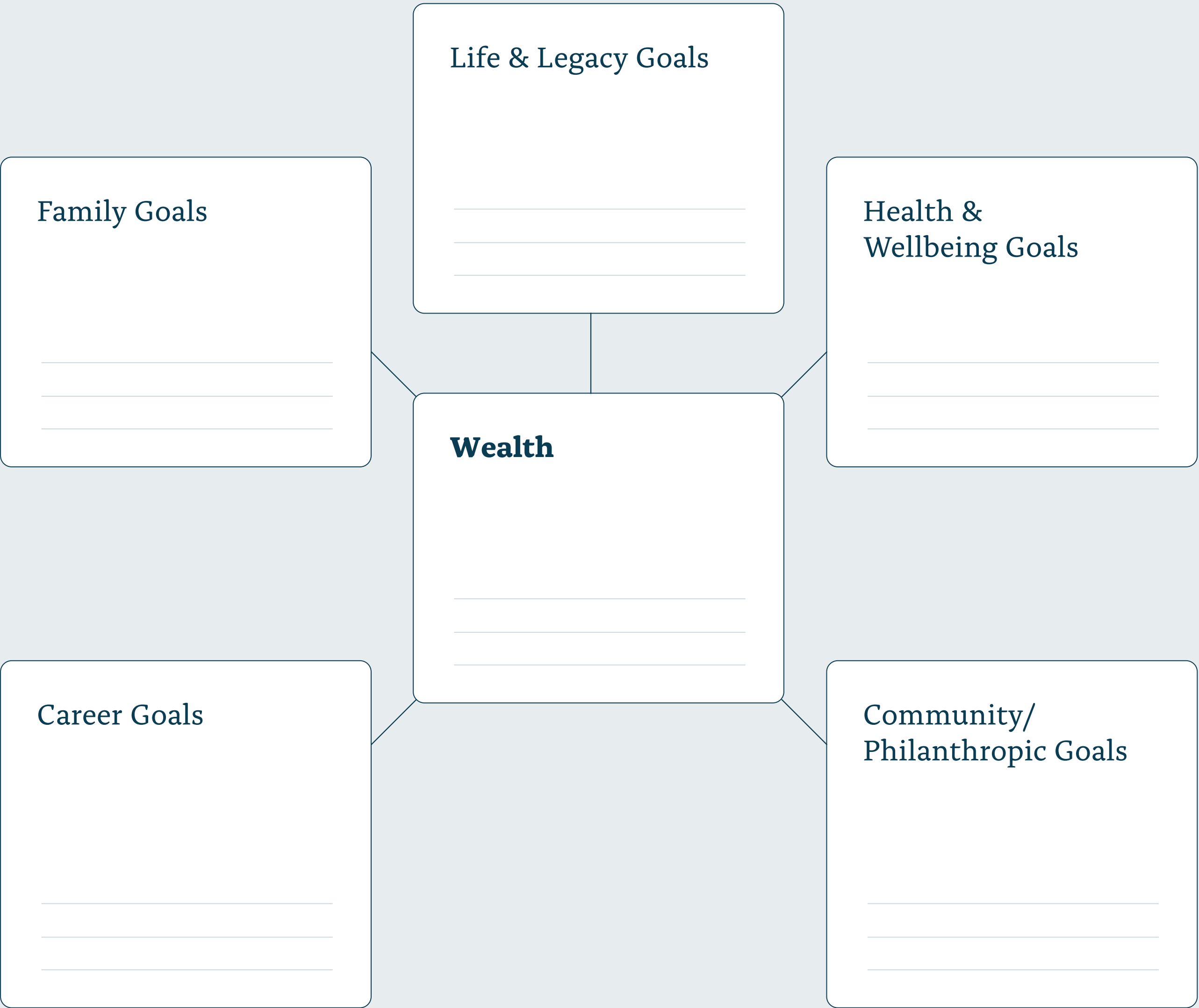
# As you heard from our first module –

the best become the best by taking a holistic approach to a client’s wealth.

They know how to think outside the box, and outside the balance sheet, for their key clients.

Use this worksheet to consider your client’s holistic care – write out your client’s goals across these key areas of their life.

If there is a specific goal, or area of their life you can’t speak to, that’s a good sign you should work with them to properly understand and plan for it.







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