

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.

Where I Scored Highest

Where I Scored Lowest

Why I Think I Scored High

Why I Think I Scored Low

Write out 2-3 behaviors that will help you build this area:

Write out 2-3 behaviors that will help you improve this area:

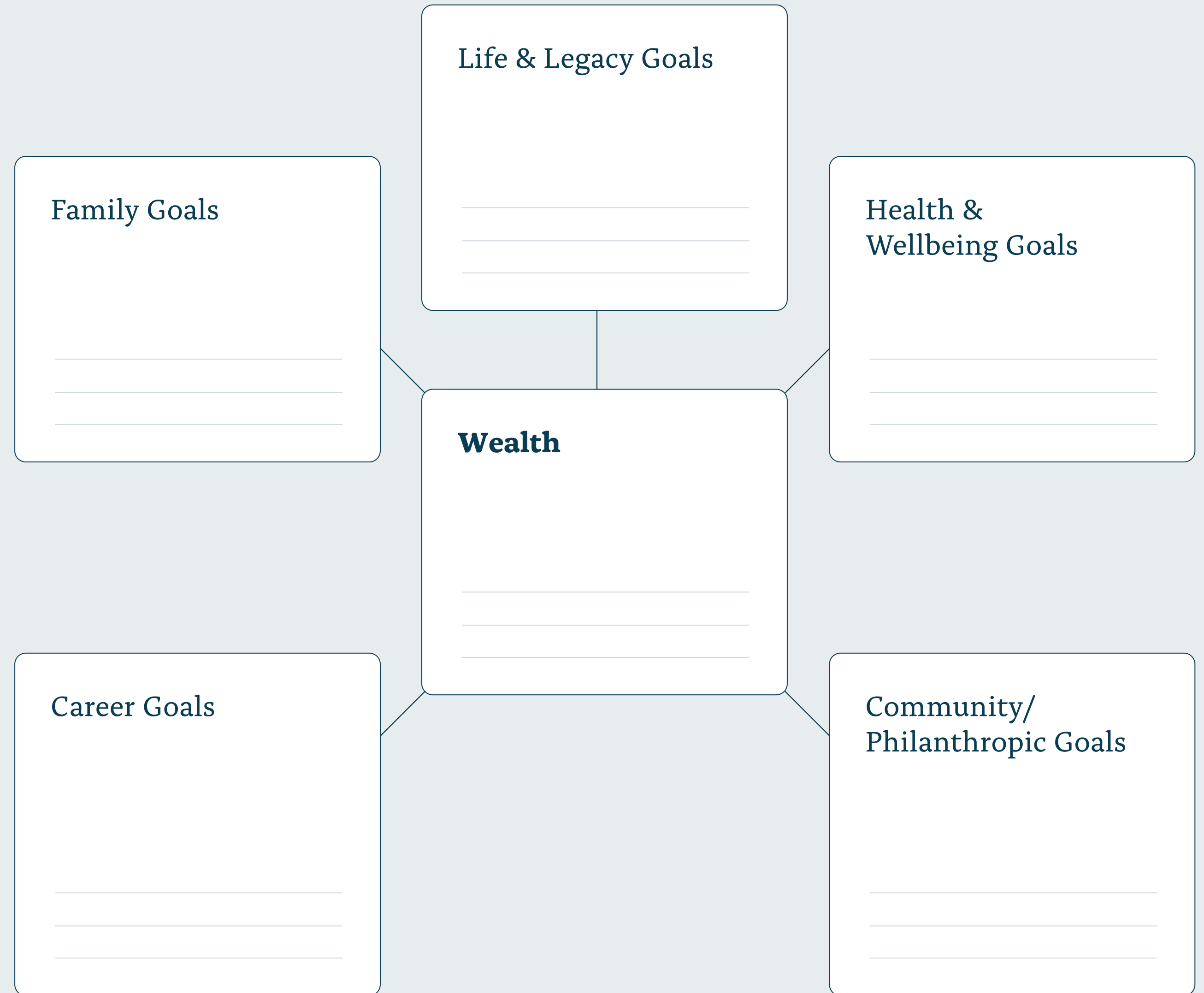
As you heard from our first module –

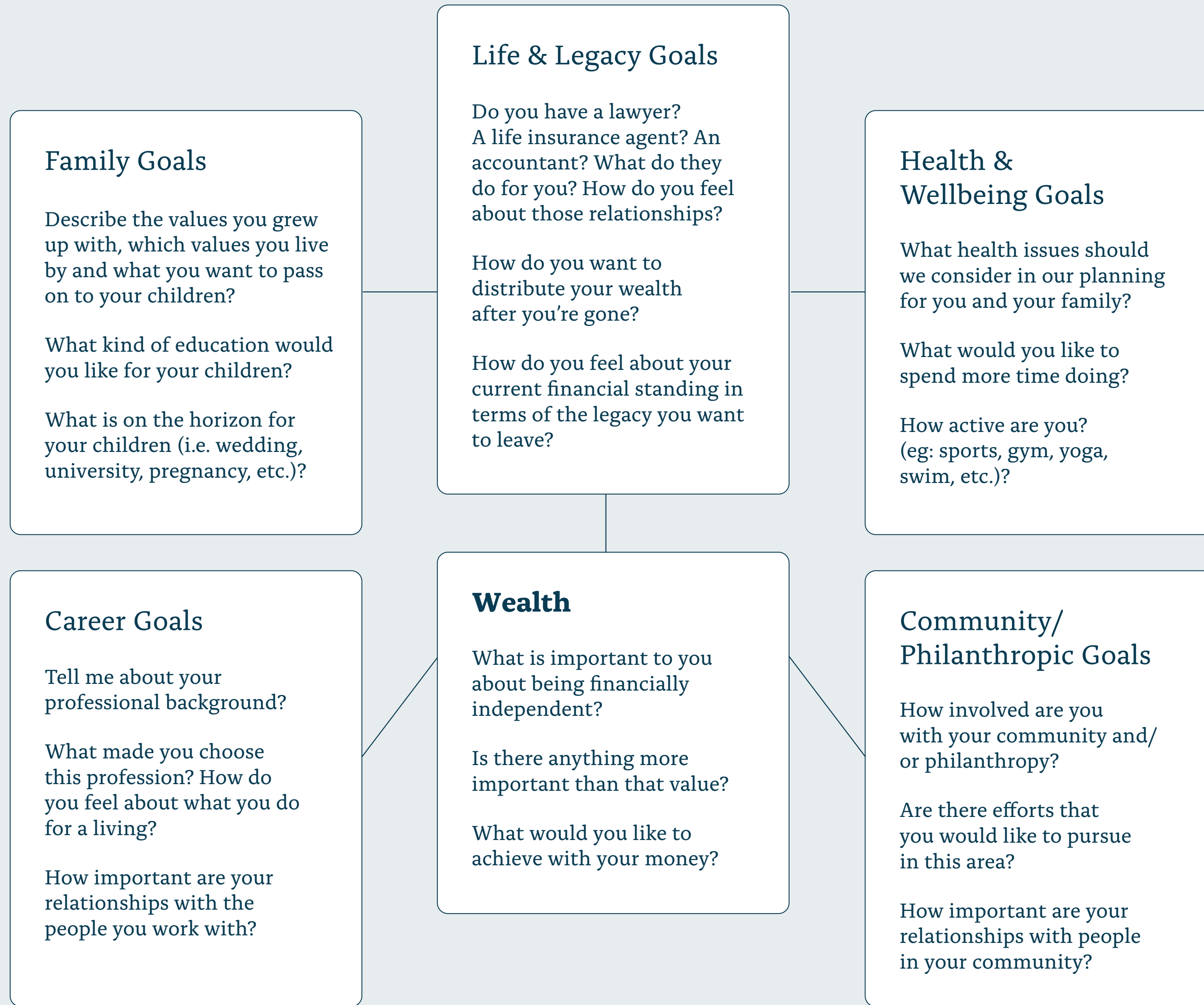
the best become the best by taking a holistic approach to a client’s wealth.

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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