TOTAL CLIENT MODEL
WIN AFFLUENT CLIENTS FOR LIFE

FRAMING THE SOLUTIONS

POSITION YOUR INVESTMENT PHILOSOPHY

VIDEO TRANSCRIPTION

John Bowen: Well, let's make it real. How do you position your investment philosophy to take advantage of what we've been talking about? Well, it's not hard to do. Let me show you exactly how you do it. And you know, if you're like most financial advisors, you already have ... Yeah, I got to believe you, if you've been doing this for a while, you've got a well-conceived investment philosophy. You could be active, passive, traditional, alternative investments, strategic, dynamic, tactical. I don't really care the way you are. I mean at CD, we're agnostic on that. I have my own personal beliefs in how I invest.

But you know, you should have your personal beliefs and once you have that, so you've got your investment philosophy. See, the purpose of the high net worth psychology is not the change the way you manage money or the way you oversee investment management. And we're going to focus on investment, you're positioning your investment philosophy now. Instead, it's all about how you effectively communicate. So, it's, you know, how do you communicate effectively so the client understands and gets inspired to take action.

And what we're looking at for you to do is using the high net worth psychology, so you now know the dominant personality of each. You can more strongly connect because it frames a possible solution with each of the affluent clients. So, you know, consider how to use this for various service and products. You know, well beyond investments, but we're going to just do it on investments right now. For each service product opportunity, you can go ahead and do this, but what I want you to do is go through, just the first 10 that you've done. Specify each to affluent clients, high net worth personality.

Remember, I asked you to do 20 but let's just do the top 10, and then write down a short explanation for each of the clients based on their high net worth personality how you would position your investment philosophy, and this is how you master framing. By doing it, by executing, by making it happen, and use this outline to communicate with your client and inspire them to action. Okay, we're making it real. Where do we go from here? We framed the solution so let's go about implementing this and I'm going to take you to the easiest path forward to have huge success. I'll see you in the next module.