



The Financial Planner's Guide to Client Consideration

Hal Rogers

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"Advisors who attempt to put their clients' interest ahead of their own have integrity; advisors who understand that their clients' interest is their interest have wisdom". Hal Rogers (Author). The Financial Advisor's Guide to Client Consideration shows financial advisors how to take care of their clients. Honesty and good service don't set you apart; they are the most basic parameters of a financial advisory practice. This guide goes far beyond these basic expectations, showing advisors how to do more for clients and differentiate themselves through the services they provide. A step-by-step manual with concepts and practical applications including a detailed list of 42 actionable considerations, it includes specific data gathering tools that provide little used but highly effective techniques and strategies advisors can provide their clients. It includes practical, relevant annuity and life insurance analysis worksheets that show advisors how to uncover and prevent hidden pitfalls. The financial advisory industry teaches "marketing", "sales ideas", and "practice management", things that are about advisors. This book is for planners, but about clients. It says, "A financial advisor can't improve his or her practice without doing something more or better for his or her clients". This book says that Life is a Mirror - Life shows us that the reflection of "selling" is "resistance". Quit selling and resistance disappears. Advisors will learn asset categorization strategies that leave clients saying, "So, how do we fix this?" before the advisor even makes a suggestion for recommendation. Advisors will learn how to considerately assist clients to "fire" their current advisor. In some cases, "dismissed" advisors won't even resist because they will know they can't compete. The financial industry appropriately prohibits speaking and writing in terms of "absolutes". There are no absolutes when it comes to risk and performance. These things are not controllable, however, some things are. Probate, at \$350 - \$400/hour for 6 - 18 months is avoidable. The author provides step-by-step procedures, implemented on a line item basis, which can prevent the need for probate and custom designed Beneficiary Designation forms that can help prevent unintended heirs. As advisors take specific steps that deliver client benefits, their competence and confidence grows exponentially. An advisor who did exceptional things for his or her last client has exceptional self-confidence when meeting with the next high-net-worth potential client. This book includes both esoteric concepts and practical elements that give advisors the foundation for understanding why certain things work the way they do and the real-world skills to put them in to practice. Clients verbally reinforce the use of the strategies covered in this guide when they say to their advisor: "No one ever asked me this before" and "Why didn't my advisor tell me this could happen?" As a final note, this book was primarily written for financial advisors, but consumers may want to use it as a benchmark by which to measure their current financial advisor relationship, or perhaps, to evaluate a potential advisor. The Financial Advisor's Guide to Client Consideration could become the new standard in the financial industry to which all financial advisors aspire.

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