The Exclusive Coaching Program

Proven Systems ... Customized Advice ... Results

GOLD MEDAL SERVICES PLANNING GUIDE

APFA
ACADEMY OF PREFERRED FINANCIAL ADVISORS
Partnering with the Industry's Best Advisors

Developing Your Own "Gold Medal Services"

When offering fee-based services to your clients (typically "A" clients), they should fully understand all of the services you provide as their financial professional.

The most successful advisors create a readily available list that defines their specific services and value adds. As a holistic advisory firm, this list should cover the specifics of the comprehensive services you offer that appeal to elite clients.

The value of your personal ***"Gold Medal Services"*** listing is twofold:

1. Your clients will better understand your unique and full menu of services.

2. It will help make potential clients aware of what differentiates your practice from other financial advisors.

The five primary categories that should be included in your list are:

1. Invesment Oversight Services
2. Tax Reduction Planning
3. Retirement Income and Distribution Planning
4. Family Wealth Planning
5. Client Services and Communication

Your list should be readily available in your lobby as well as a regular handout during your client reviews and prospect meetings.

This guide will help you define your personalized list of services. Complete this guide and send us your list. As always, if you need assistance call or email us and we help you create the optimal menu of services for your practice.

★★★★★

Five Star Tip

A key consideration for developing your menu of services is to have a client revenue or investment amount that would be necessary for clients to receive these services.

Tailor your "Gold Medal Services" listing to the highest-level clients in your chosen market niche and be clear about exactly what sets you apart from other advisors. If done well, your "Gold Medal Services" list will assure potential clients that they have come to the right place!

What Makes My Practice Unique?

1. ______________________________

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2. ______________________________

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3. ______________________________

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4. ______________________________

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5. ______________________________

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6. ______________________________

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7. ______________________________

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“Ideal” Clients and “Qualified” Prospects Services Evaluation

Seven services that are most important for my “Ideal” clients and “Qualified” prospects are:

1. ____

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2. ____

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3. ____

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4. ____

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5. ____

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6. ____

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7. ____

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GOLD MEDAL SERVICES

The New Standard in Personalized Wealth Management

GOLD MEDAL SERVICES

Investment Oversight Service

- Reviewing your investments and designing a personalized portfolio appropriate to your needs
- Year-long, continual monitoring of your investments
- Quarterly, semi-annual or annual meetings to review and evaluate your investment performance, update your overall financial objectives and if necessary, reallocate your portfolio as agreed upon by you
- Independent Advice
- Recommendations regarding positioning of investments within your employer provided retirement plans such as 401(k)s
- Quarterly economic report detailing updated analysis and a current view of the investment markets

Tax Reduction Planning

- Comprehensive review of your tax return to highlight opportunities for maximizing tax reduction strategies
- Annual review of your tax situation and planning to incorporate any new tax law changes
- Complimentary consultation with your tax preparer
- Recommendations of tax solutions including tax advantaged investments
- Staying current on and presenting new tax laws that can affect your situation

Retirement Income & Distribution Planning

- Analysis of your current and future income needs
- Continual development and implementation of recommendations to fund your income needs to optimize your lifestyle
- Recommendations regarding the most appropriate distribution strategy for your employer retirement plans and IRAs
- Analysis of the beneficiaries of your IRAs

Family Wealth Planning

- Analysis of your current estate plan
- Review of strategies to efficiently transfer wealth to your loved ones
- Complimentary consultation with your attorney
- Assistance in transferring assets to your Living Trust or other trusts
- Providing guidance with the appropriate and necessary steps in the event of the death of a loved one

Client Services & Communications

- Quarterly Newsletter to keep you apprised of the most current planning strategies
- Quarterly, semi-annual or annual reviews
- Special reports on how to help reduce your taxes and other important topics
- Special Gold Medal Service Events, including client appreciation events (where you may bring up to 2 guests)

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Gold Medal Services or ____________________
"The New Standard in Personalized Wealth Management"

Investment Oversight Service or ___________________________

1. ____
2. ____
3. ____
4. ____
5. ____

Tax Reduction Planning or ____________________________________

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____

Retirement Income & Distribution Planning or ________________

1. ____
2. ____
3. ____
4. ____
5. ____

Family Wealth Planning or ______________________________

1. ____
2. ____
3. ____
4. ____
5. ____

Client Services & Communications or ____________________________

1. ____

2. ____

3. ____

4. ____

5. ____