Advantage Coaching & Training

Workshop Abstracts

Session: The Adaptive Advisor

Times are changing and those who do not change are vulnerable to huge challenges, frustration, and potential failure. Whether it is regulatory changes, new firm initiatives or changes in client expectations, the success parameters of being a Financial Advisor are shifting. Advisors must adapt in order to flourish while others flounder. At the same time, many of us have mindsets, emotions, and habits that can interfere with our ability to change effectively and easily. To truly change we must have desire, intent, and persistence. These elements are impacted in our session "The Adaptive Advisor."

The Workshop: In this highly interactive session, Financial Advisors will:

- ✓ Explore the reasons for transitioning from traditional ways of dealing with clients to progressive methods
- ✓ Examine common blocks to changing mindsets, emotions and habits
- ✓ Create a conscious intent for the future of their business
- ✓ Explore a decision-making tool to use as they consider adopting new approaches such as goals-based planning
- ✓ Learn techniques to persist in the face of internal or external adversity to change

Participants will leave the session empowered to break habits, transform their business and adapt to the demands of the future.

Contact information

For further information on these sessions feel free to contact us at Advantage Coaching & Training, Inc., 122 N. Wheaton Ave., Wheaton, IL 60187; phone: (630) 293-0210 x 102; email: info@advantagecoaching.com.