

The Performance Through Planning Program™



GOALS of the program

- Identify your target clients and calculate your cost per household
- Launch a client referral campaign
- Conduct a marketing campaign to host a Life Goals seminar
- Introduce planning to your existing clients
- Complete four plans (generating planning fees)
- Implement an ongoing client review meeting system
- Begin the transition from DSC to fee based commissions

How does the program work?

- Each program lasts 12 weeks
- We'll walk through all the templates and review the marketing activities required during 3 web-based, live and interactive training sessions
- Between sessions, detailed agendas show you and your team exactly what to do each week to stay on track to produce results

WHAT is included?

- Attracting Clients - Life Goals Planning Turnkey Seminar™ (Incl. 50 copies of the book [No Regrets](#))
- Advising Clients - The Financial Planning Package™
- Keeping Clients - The Client Review Kit™
- 12-week Performance Through Planning Program™:
 - 3 small group web training sessions
 - 12, 1-week agendas
 - Comprehensive binder with printed copies of:
 - 20 templates and guides
 - 4 bonus templates
 - 8 QuickPlan™ cards
 - 12 Articles of interest
- CD with all the templates in electronic format

WHO should participate?

- Advisors looking to Attract, Advise, and Keep clients by focusing on financial planning
- Advisors should:
 - Know how to complete a basic financial plan;
 - Have at least 80 households;
 - Have at least \$5 million in AUM;
 - Be willing to commit additional resources to the marketing (printing, postage etc.);
 - Be able to commit the time required to complete all the weekly tasks.

If you are committed to growing and differentiating your practice by focusing on life goals financial planning, the Performance Through Planning Program™ is for you.

Branch & dealership pricing is available. Learn more at www.AdvisorPractice.com/ptpp.