

CERTAINTY INNOVATION DAY

Thursday 17th March 2022

EXCHANGING PROGRESS OF CERTAINTY CLIENTS
SESSION OBJECTIVES & QUESTIONS

EXCHANGING CERTAINTY CLIENT PROGRESS

SIGNIFICANT LEARNING & DEVELOPMENT OBJECTIVES***:

Participating in this session aims to maximise the probability that participants will...

Kinds of Learning

LEARNING OBJECTIVES

Foundational knowledge

(limited to what is considered really important to retain)

Understand the pros and cons of a variety of Certainty Advice Client implementation models

Application

(what is it we want participants to be able to do six months on?)

Improved the Certainty Advice Client implementation models (i.e. better serving client's best interests while accelerating returns for advisory teams and firms)

Integration

(what connections will participants make with other areas of their professional lives?)

Modify existing implementation paradigms as to who and how Certainty Advice can better achieve returns for clients, their advisor team and their firm

Human Dimension

(what have participants learned about themselves or how they interact with others?)

Have greater awareness of the value and pricing of their Certainty Advice

Caring

(demonstrating an increased appreciation for the subject matter)

Greater understanding and value of forging specific advisory niches of interest for each participant

Learning How to Learn

(becoming a self-directed learner)

Increased focus and attendance at on-going community and theory sessions to further the delivery of valuable advice.

- Who is an ideal Certainty Client for you? Why?
- Who is not an ideal Certainty Client for you? Why?
- Do you screen your enquiries? If so, how?
- What are your minimum & maximum annual fees for Certainty Clients?
- What range of services do you deliver for your Certainty Clients?
- How do you source your Certainty Clients?
- What has been your biggest insight delivering Certainty Advice?
- What is your biggest challenging implementing Certainty Advice?
- Anything else?

