Flexible Plan Investments, Ltd.

Your partner in active wealth management

DYNAMIC RISK-MANAGED INVESTING | STRATEGIC DIVERSIFICATION | MANAGING INVESTOR EXPECTATIONS

WEBINAR SERIES

With featured speaker Ray Sclafani, Founder of ClientWise

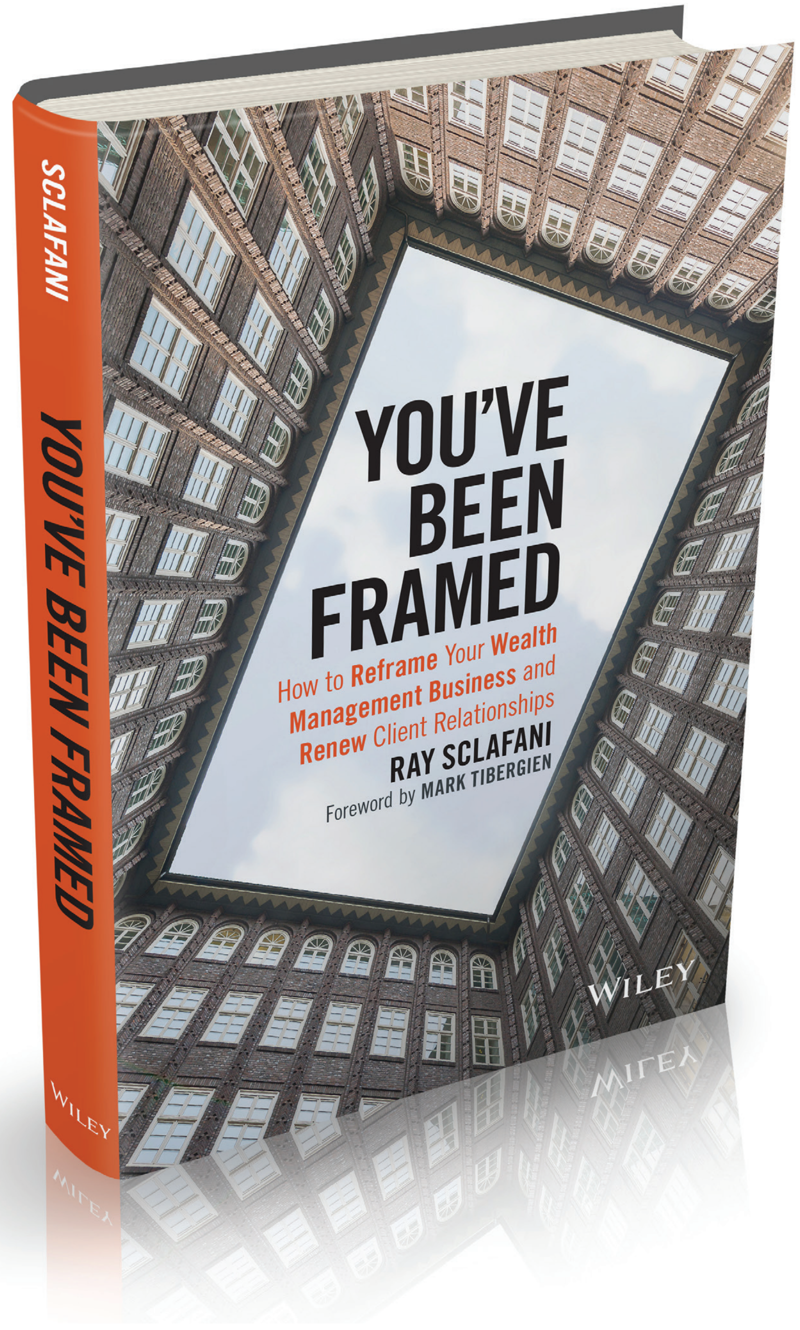
Practice Management

YOU'VE BEEN FRAMED

8 Steps to Developing the Most Important Marketing Tool of All

clientwise™

GET CLEAR. GET FOCUSED. GET RESULTS.™


YOU'VE BEEN FRAMED
How to Reframe Your Wealth Management Business and Renew Client Relationships
RAY SCLAFANI
Foreword by MARK TIBERGIEN
WILEY
SCLAFANI
YOU'VE BEEN FRAMED
WILEY

Wealth Management Practice Reframes for the Twenty-First Century

	Old Frame		New Frame
Reframe #1	I provide my clients with one particular financial service.	▶	**We provide our clients with comprehensive wealth management that begins with outcomes-based financial planning.**
Reframe #2	I sell to my clients.	▶	**We partner with our clients.**
Reframe #3	I am the best at serving my clients.	▶	**Our team is the best at serving our clients.**
Reframe #4	I know what is of value to my clients.	▶	**Our clients and our team work together to define what value our clients need and what value our team can provide.**
Reframe #5	I allow clients to rent my services until I choose to stop practicing.	▶	**We build a legacy business that serves multiple generations to come.**


PITCH
BOOK

8 Steps to Developing the Most Important Marketing Tool of All

CAPABILITY DECK

Five Uses of the Capability Deck

1. With current clients - “The Re-Frame”
2. With client advocates
3. With professional advocates and centers of influence
4. With prospective clients
5. With team members

8 Steps to Developing Your Capability Deck

1 Why you do what you do

8 Steps to Developing Your Capability Deck

1. Why you do what you do
2. Who your firm is built to serve

8 Steps to Developing Your Capability Deck

1. Why you do what you do
2. Who your firm is built to serve
3. Known needs of your ideal client

8 Steps to Developing Your Capability Deck

1. Why you do what you do
2. Who your firm is built to serve
3. Known needs of your ideal client
4. Unknown needs of your ideal client

8 Steps to Developing Your Capability Deck

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4. Unknown needs of your ideal client
5. Solutions, not just "products," you provide your ideal client

8 Steps to Developing Your Capability Deck

1. Why you do what you do
2. Who your firm is built to serve
3. Known needs of your ideal client
4. Unknown needs of your ideal client
5. Solutions, not just "products," you provide your ideal client
6. Your unique, client-outcome oriented wealth management process

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6. Your unique, client-outcome oriented wealth management process
7. Your team of trusted professionals (internal and external)

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7. Your team of trusted professionals (internal and external)
8. Setting expectations

Now what?

1

Begin to answer the questions to help develop your capability deck

2 Get Help

No need to go it alone

clientwise.com/fpi/value-prop

3 Contact ClientWise

Speak with us directly:
(800) 732-0876

Check out our website:
clientwise.com

Browse our community:
exchange.clientwise.com

Read our blog:
clientwise.com/blog

Follow us on Twitter:
@clientwise

clientwise.com/fpi/value-prop

Flexible Plan Investments strategy categories

- QFC Strategies
- Core
- All-Terrain
- Domestic Tactical Equity
- Fixed Income
- Tactical Fixed Income
- Alternatives
- Sectors
- International
- Principled Investing

QFC STRATEGIES FROM FLEXIBLE PLAN INVESTMENTS

Two levels of risk management
One low cost

Advisor tools

Suitability Questionnaire

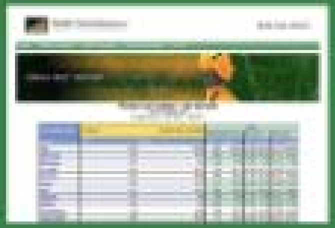
OnTarget Proposal Generator

Strategy Research Reports

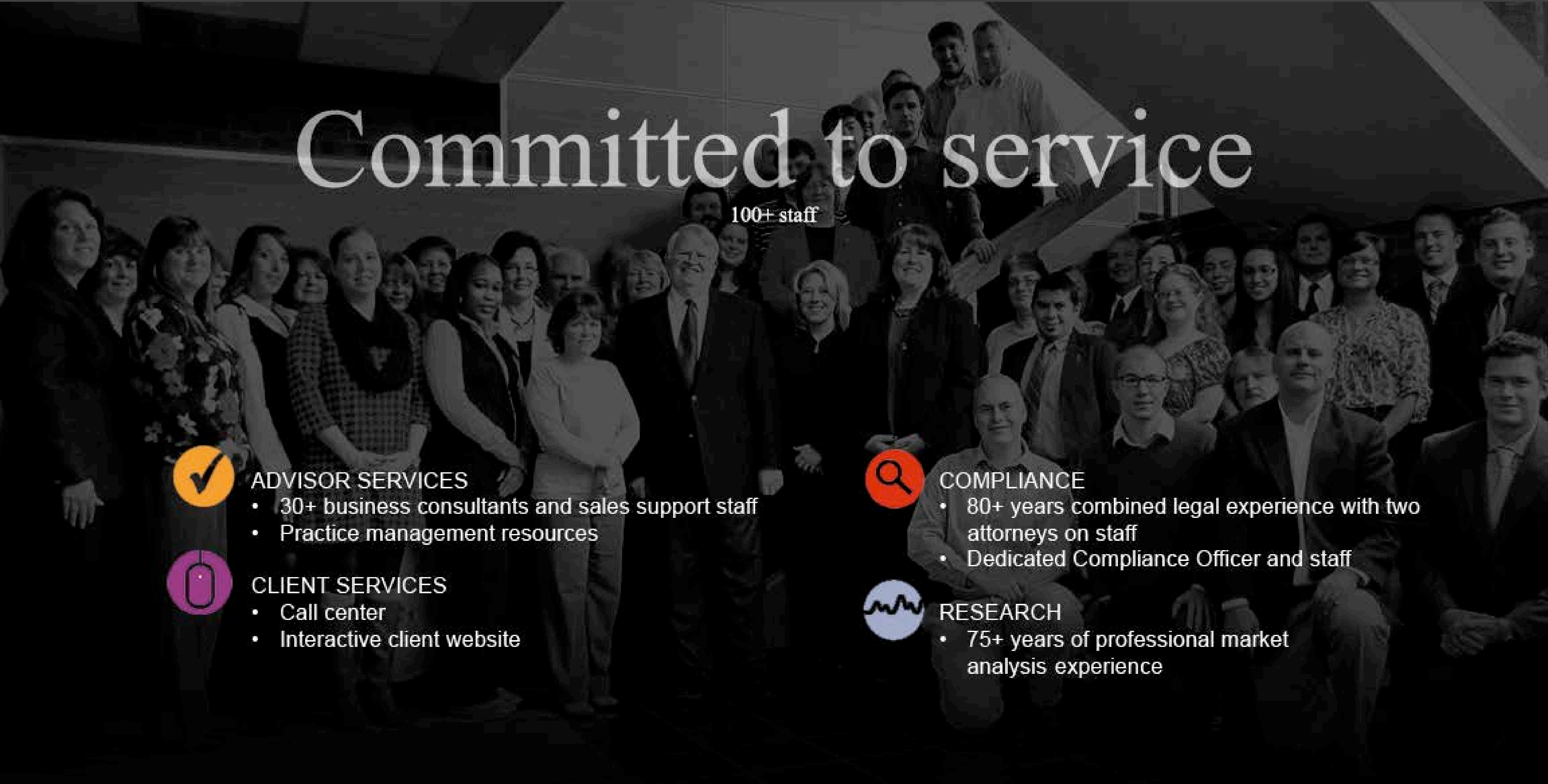
Strategy Fact Sheet

Illustration Generator

My Business Analyzer



Crash Test Analyzer



Committed to service

100+ staff

ADVISOR SERVICES
- 30+ business consultants and sales support staff
- Practice management resources

CLIENT SERVICES
- Call center
- Interactive client website

COMPLIANCE
- 80+ years combined legal experience with two attorneys on staff
- Dedicated Compliance Officer and staff

RESEARCH
- 75+ years of professional market analysis experience

Providing the solutions

7 FPI educational tracks

- Principled Investing
- Working with a TAMP and with SMAs
- Small accounts
- Variable annuities
- Being a proactive advisor (OnTarget)
- Individual workplace retirement accounts
- Group retirement accounts

We can help

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Questions?

Please type any questions
into the chat box to the right.