Flexible Plan Investments, Ltd.

Your partner in active wealth management

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

WEBINAR SERIES

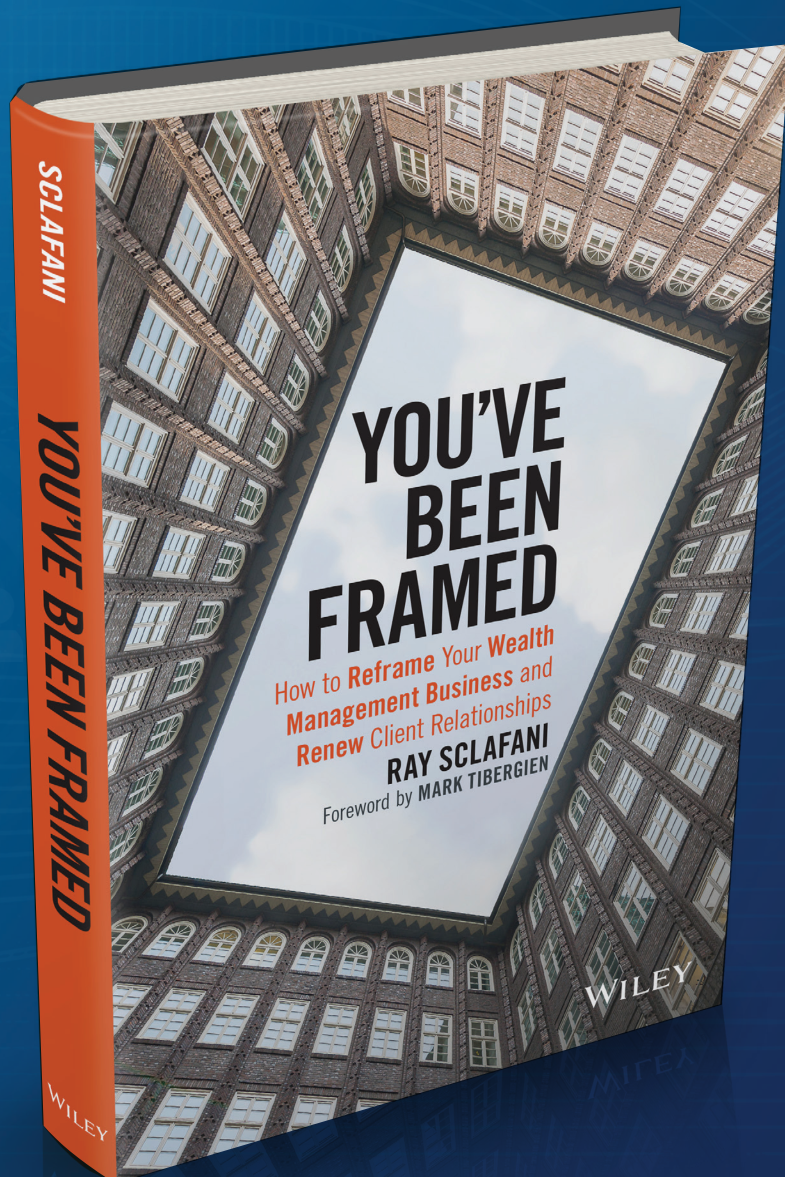
What the Best in the Business Don't Want You to Know™

With featured speaker Ray Sclafani, Founder of ClientWise

What the Best in the Business Don’t Want You to Know™

clientwise™

GET **CLEAR**. GET **FOCUSED**. GET **RESULTS**.™


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

Top 10 Secrets of “The Best in the Business”

1

Are intensely **focused on growth** and are willing to engage in a reframe.

Growth

2

Understand that they cannot go it alone in today’s world and that **building a strong team** is essential.

Team

3

Have already **expanded their definition of wealth management** to include a more comprehensive approach that has planning at its foundation.

Wealth Management Expanded

4

Are willing to take the time to **get clear on how they uniquely define wealth management services** offered by their practice.

Wealth Management Defined

5

Are **clear about their unique value proposition** rather than just having a canned elevator speech.

Unique Value

6

Have conditioned clients to **understand the real value of their advisory practice,** getting them invested in what the practice has to offer and turning them into **loyal advocates.**

Loyal Client Advocates

7

Know how important it is to **attract human capital** and are willing to invest in the process of finding the **right individuals for the team.**

Human Capital

8

Have **stopped selling** to clients and are **truly partnering.**

Partner

9

Believe in the importance of **leadership development for themselves and their teams**, moving folks on a trajectory from sales to technical expertise to leadership.

Leadership

10

Are comfortable **partnering with other professionals** to support clients across the full wealth management spectrum.

Other Professionals

clientwise™

The Best in the Business Self Assessment™

	My Performance Score			Current Priority			Progress Last 12 Months	What's Next
	Low	Medium	High	Low	Medium	High		
1. I am intensely focused on growth and I am willing to engage in a reframe.	❑	❑	❑	❑	❑	❑		
2. I understand that I cannot go it alone in today's world and that building a strong team is essential.	❑	❑	❑	❑	❑	❑		
3. I have already expanded my definition of wealth management to include a more comprehensive approach that has planning at its foundation.	❑	❑	❑	❑	❑	❑		
4. I am willing to take the time to get clear on how I uniquely define wealth management services offered by my practice.	❑	❑	❑	❑	❑	❑		
5. I am clear about my value proposition rather than just having a canned elevator speech.	❑	❑	❑	❑	❑	❑		
6. I have conditioned clients to understand the real value of their advisory practice, getting them invested in what the practice has to offer and turning them into loyal advocates.	❑	❑	❑	❑	❑	❑		
7. I know how important it is to attract human capital and I am willing to invest in the process of finding the right individuals for the team.	❑	❑	❑	❑	❑	❑		
8. I have stopped selling to clients and I am truly partnering.	❑	❑	❑	❑	❑	❑		
9. I believe in the importance of leadership development for myself and for my team, moving folks on a trajectory from sales to technical expertise to leadership.	❑	❑	❑	❑	❑	❑		
10. I am comfortable partnering with other professionals to support clients across the full wealth management spectrum.	❑	❑	❑	❑	❑	❑		

clientwise.com/fpi/best

Learn more about ClientWise

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MANAGING INVESTOR EXPECTATIONS

Flexible Plan Investments strategy categories

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

Providing the solutions

7 FPI educational tracks

- Principled Investing
- Working with a TAMP and with SMAs
- Small accounts
- Being a proactive advisor (OnTarget)
- 403(b)
- 401(k)
- Variable annuities

We can help

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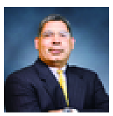
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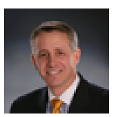
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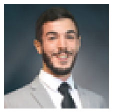
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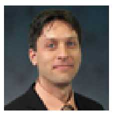
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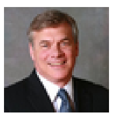
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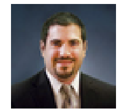
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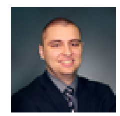
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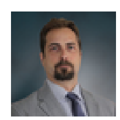
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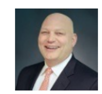
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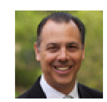
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