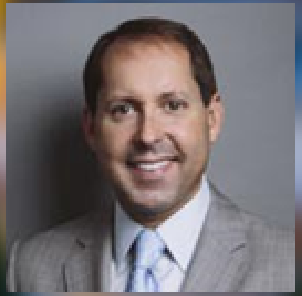
Flexible Plan and ClientWise present:

Practice Management

Know what your clients think of you?

Asking the right questions makes all the difference.

With featured speaker Ray Sclafani, Founder of ClientWise



Moderated by

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FIVE CRITICAL QUESTIONS

YOU SHOULD BE ASKING YOUR CLIENTS RIGHT NOW

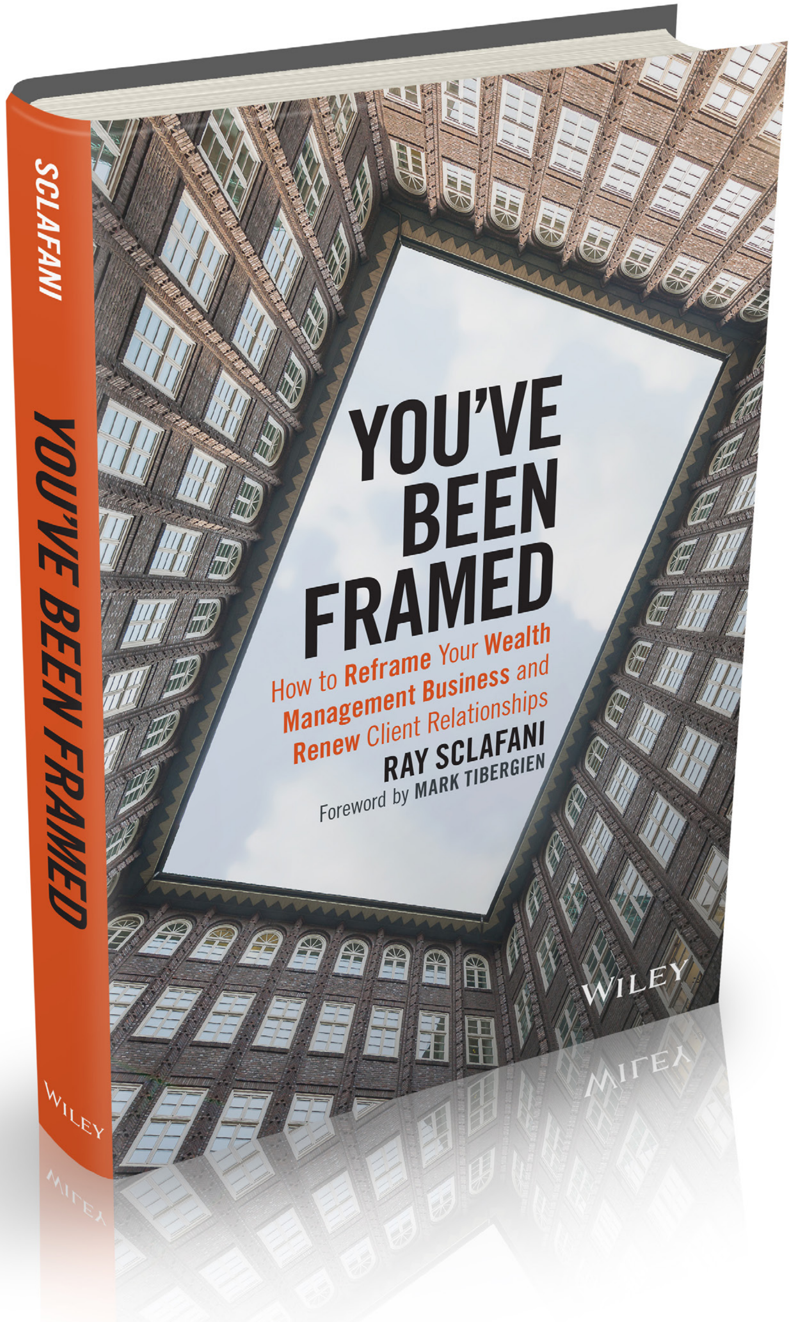
clientwise™

GET CLEAR. GET FOCUSED. GET RESULTS.℠

LISTEN

“The most basic of all human needs is the need to understand and be understood. The best way to understand people is to listen to them.”

— Ralph Nichols


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

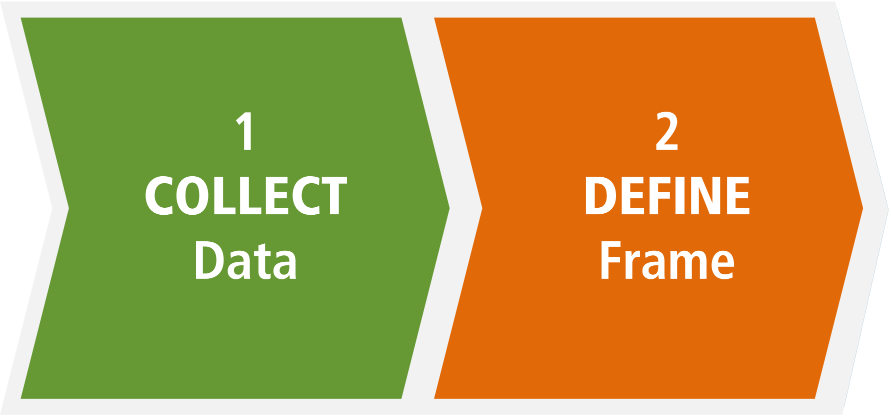
What’s A Frame?

The frame is constructed of those words the client, the media, your team, or anyone else uses to describe what it is that you do and the way in which you do it.

The Five Steps to Reframing Your Wealth Management Business™

1
COLLECT
Data

The Five Steps to Reframing Your Wealth Management Business™



The Five Steps to Reframing Your Wealth Management Business™

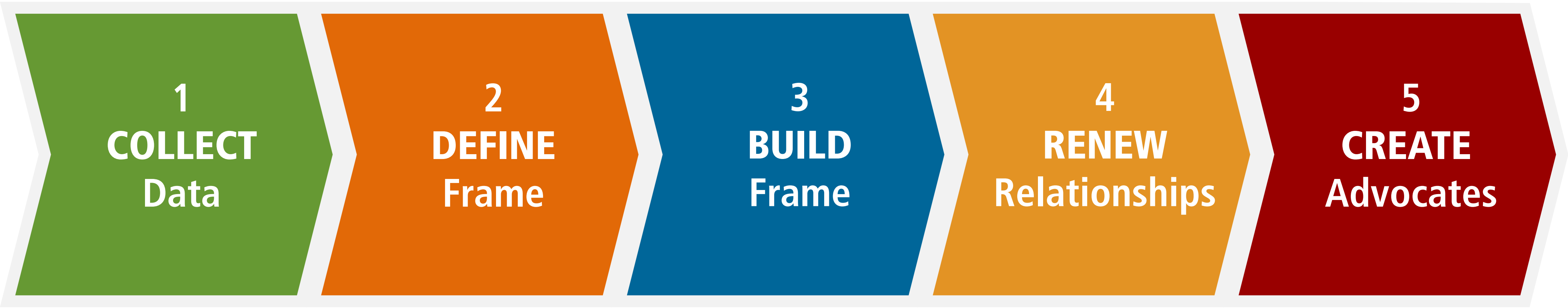
1
COLLECT
Data

2
DEFINE
Frame

3
BUILD
Frame

The Five Steps to Reframing Your Wealth Management Business™

The Five Steps to Reframing Your Wealth Management Business™



The ClientWise Conversation™

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1. "What is the **one thing** you value most about how my firm and I serve you?"

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4. "How would you describe what it is that we have achieved together?"

The ClientWise Conversation™

1. "What is the <u>**one thing**</u> you value most about how my firm and I serve you?"

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3. "If you were to describe the services that my firm and I offer to clients like yourself, what would you say?"

4. "How would you describe what it is that we have achieved together?"

5. "Among your other professional advisors, who do you trust the most and why?"

ClientWise Conversation Data Collector™

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GET CLEAR. GET FOCUSED. GET RESULTS.™

Name:	Date:

clientwise.com/fpi/questions

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clientwise™

Flexible Plan Investments, Ltd.

Your partner in active wealth management

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

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 four attorneys on staff
- Dedicated Compliance Officer and staff

RESEARCH
- 140+ years of professional market analysis experience

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

Providing the solutions

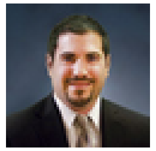
7 FPI educational tracks

- 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

REGIONAL BUSINESS CONSULTANTS

West



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Questions?

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