

**Flexible Plan Investments, Ltd.**  
Your partner in active wealth management since 1981

PAST PERFORMANCE DOES NOT GUARANTEE FUTURE RESULTS.  
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Flexible Plan and ClientWise present:

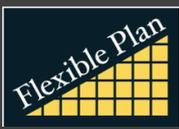
Practice Management 

# Know what your clients think of you?

Asking the right questions makes all the difference.

*With featured speaker  
Ray Sclafani, Founder  
of ClientWise*





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*Moderated by*



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**Vice President of National Accounts**

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# FIVE CRITICAL QUESTIONS

## YOU SHOULD BE ASKING YOUR CLIENTS RIGHT NOW

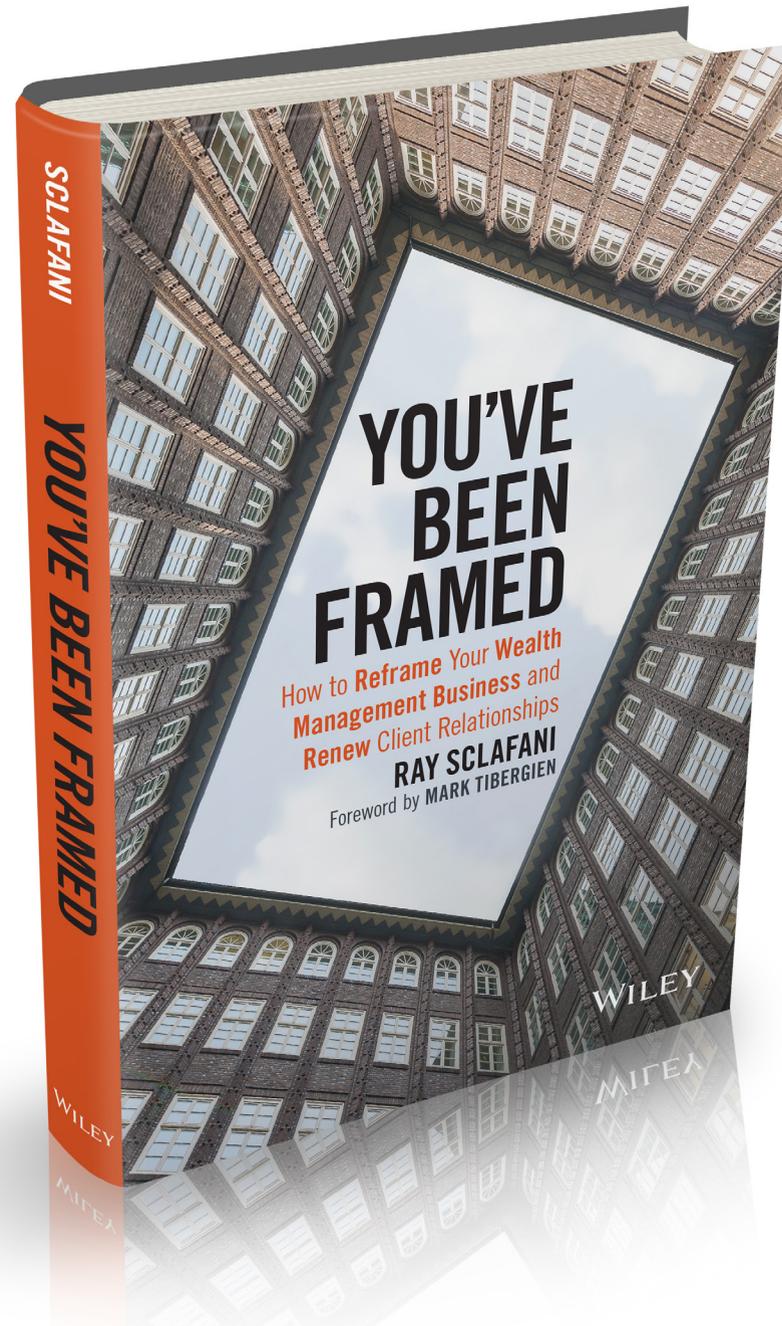


GET CLEAR. GET FOCUSED. GET RESULTS. ■

# 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**



# 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.

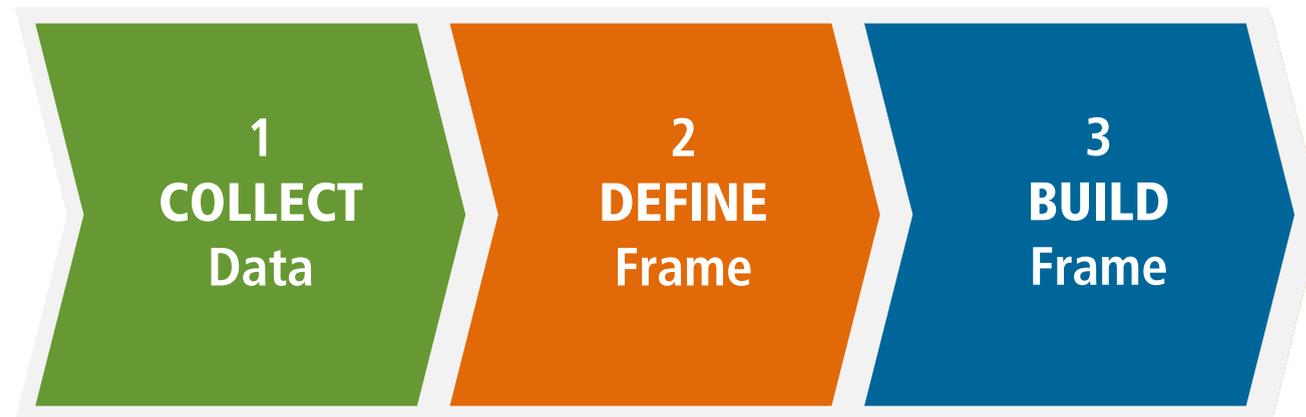
# The Five Steps to Reframing Your Wealth Management Business™



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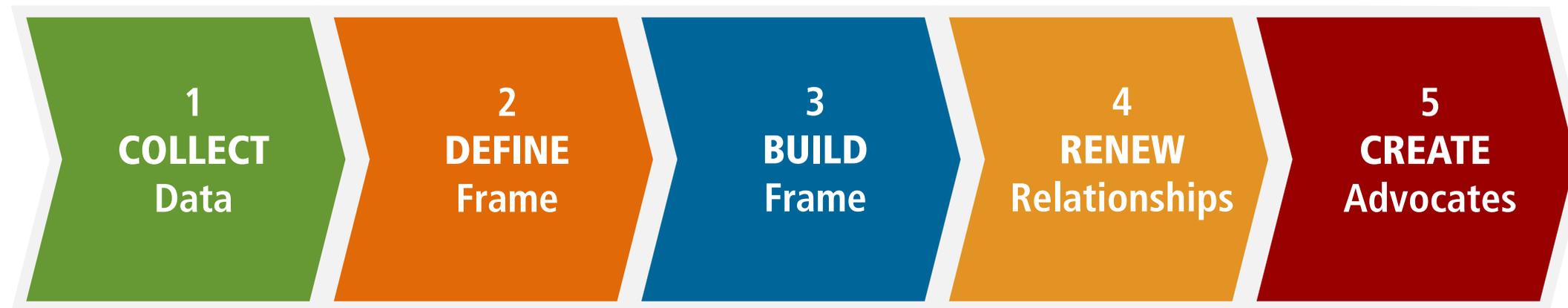
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# The ClientWise Conversation™

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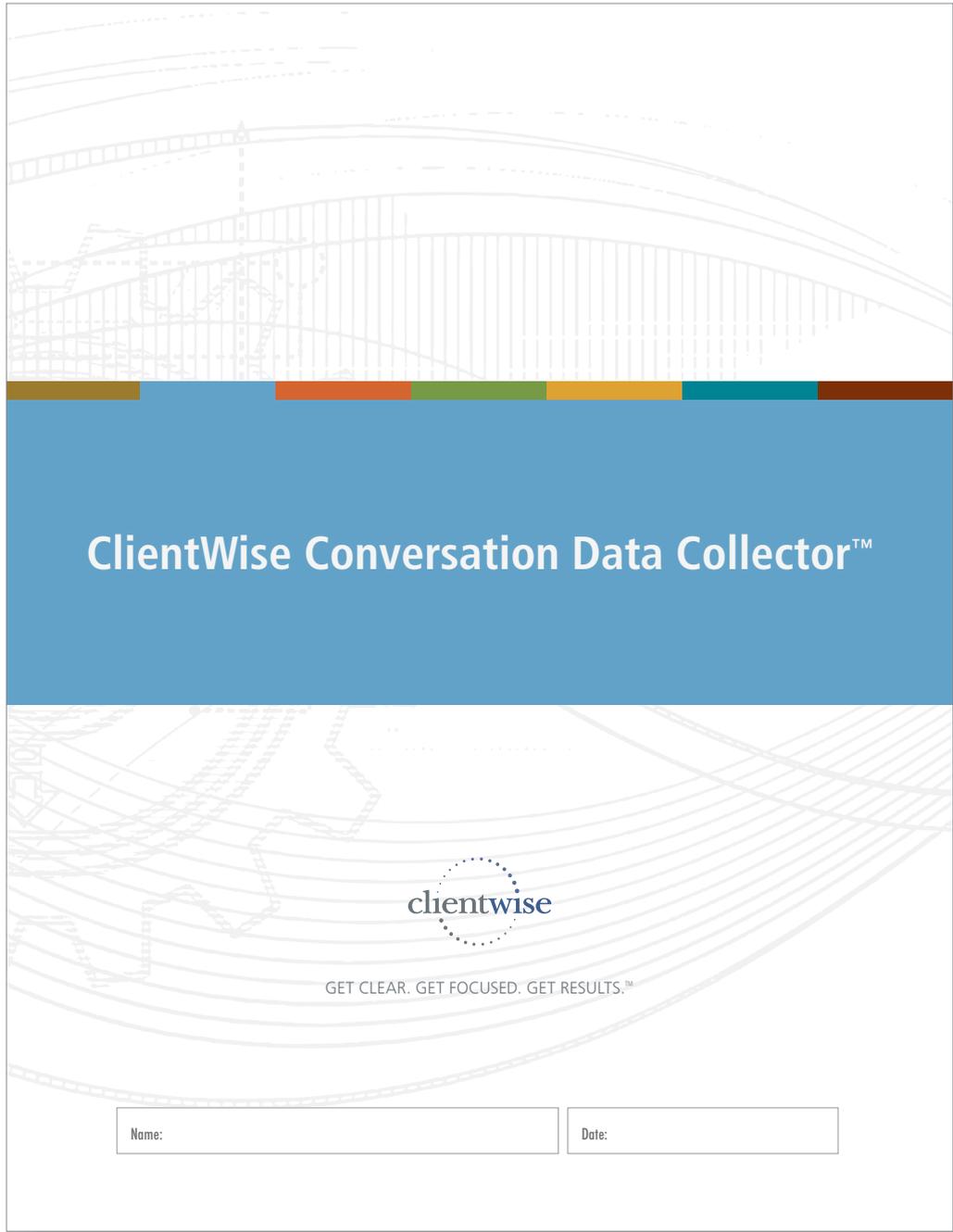
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4. “How would you describe what it is that we have achieved together?”

# The ClientWise Conversation™

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2. “What is the one thing you would most like me to change, or improve, about my firm and how I serve you?”
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?”



The cover page features a background of light gray line art depicting a globe and various data visualization elements like charts and graphs. A prominent blue horizontal band across the middle contains the title. Below this band, the Clientwise logo and tagline are centered. At the bottom, there are two input fields for 'Name' and 'Date'.

# ClientWise Conversation Data Collector™

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

Name:  Date:

[clientwise.com/fpi/questions](https://clientwise.com/fpi/questions)

## Learn more about ClientWise services

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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**



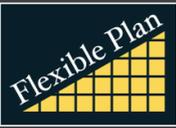
**Crash Test  
Analyzer**



## 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	Midwest	Northeast	South
 <p><b>Brandon Noronha</b> 248-939-5693 Southern California</p>	 <p><b>Mike Brashier</b> 651-338-5670 Illinois, Iowa, Minnesota, Nebraska, North Dakota, South Dakota, Wisconsin</p> <p>FULL BIO</p>	 <p><b>Bob Muldoon</b> 703-625-1775 District of Columbia, Delaware, Maryland, New Jersey, Eastern Pennsylvania, Virginia</p> <p>FULL BIO</p>	 <p><b>Leonard Durso, ChFC, AIF</b> 412-225-4936 Florida, Georgia</p> <p>FULL BIO</p>
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 <p><b>Rob Shampine</b> 248-939-5701 Alaska, Southern California, Puerto Rico, U.S. Virgin Islands</p>			
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*Market Leaders Product Specialist*



**Trent Schield**  
303-618-6000



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# Questions?

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