Agenda

8:00 – 8:50

Introduction & Reinvention Review™

- A review of the training for the day along with general overview of The Mind Map Illustrator™.
- Reinvention Plan – A practical exercise to identify actual clients for immediate implementation.

9:00 – 10:50

Behavioral Change & The Mind Map Illustrator™

- Behavioral system - Review model for making both qualitative and quantitative behavioral changes to a financial advisory practice.
- Client Master Mind Map – Step by Step process to build an actual client master Mind Map (homework required.)

11:00 – 11:50

Confidence Builder Techniques

- Confidence Builder Techniques – Detailed techniques to implement the client master Mind Map in financial advisory practice with retainer/project fees.

12:00 – 1:00

Working Lunch

1:00 – 1:50

The Matrix Builder™

- Mind Map building – Hands on building of a Mind Map with 5 step approach and The Matrix Builder™. Review Guide to Best Practices building Mind Maps.

2:00 -2:50

Mind Map Library

- Mind Map Library Review – Review of Wealth and Financial Advisor Practice Mind Maps. Exporting Mind Maps to Word and emailing Mind Maps to clients/advisors

3:00 – 3:50

Information Technology Client Master Mind Map

- CRM, Document Management Software Interface – Connect both CRM and Electronic document management to Client Master Mind Maps. (homework required.) Work on Client Master Mind Map.