

Learning Hour March 17, 2022

New Client-Facing PowerPoint Presentations

Steve Sanduski: Hello everyone. And welcome to this. Month's learning hour, Steve here. I've got Amy with me as well. Mitch would have been here, but he let us know about an hour ago that he is not feeling well. So he's trying to get back to good health here. So he won't be with us this morning, but I appreciate all of you being here with us today.

What we're going to do today is we have two new client facing PowerPoint presentations, and these two are going to cover. A couple of the tools that we have, one is with the fiscal ossify and the other one is with the lifeline. Now we've got a variety of folks that are with us on the call today. So some of you have access to everything.

And the two tools that we're going to talk about here, you'll have access to some of you might not have access to, uh, to these depending on which membership level that you're in. But, uh, Show this to everybody. And maybe if you don't have access to it, it might be something that'll spark your interest in wanting to get access.

So I just wanted to get that out there. Uh, all right. So the first one that, uh, we're going to talk about here is a new money conversation for couples and what we're going to do here. Amy and I are gonna tag team this a bit. We'll go through the presentation, just, uh, briefly tell you what it's all about.

We'll go through each of the slides. We'll talk about some of the logistics. Related to it in terms of how do you actually present this, we've designed these so that you can present them virtually, or you can present them in person, or you can actually prerecord them and just show them on your website.

Or maybe you send an email to your client or prospect with a link. We also have paper versions of these two tools that are available. And we'll talk about how you integrate the paper tools as appropriate with these, uh, as we go through this, when

we finish as always let us know if you have any questions, you can pop your questions in the, uh, the, the Q and a box there at any point.

And we'll be taking a peak at that and see what comes up there. And answer those in real-time as appropriate, or we can answer them toward the end of the presentation. Uh, all right. So, Amy, I think you're going to kick it off here with just some logistics. Again, the first one here is a new, uh, money conversation.

Uh, for clients and this one relates to the fiscal last Sufi tools. So what are some of the logistics here, Amy?

Amy Koenig: Yeah. So with this first slide, the site is simply for you. So this is a slide that after you've gone through this and made the updates as it mentions here, uh, you don't want him to go ahead and delete that slide.

So that's not something you'll share with clients. Um, but it's the instructions. Uh, a couple of things here. We have some logos where you can place. I'm on slide two here, slide three, as well as on slides, 11 and 12. Um, and I believe 10. So there are a few slides for you to put your logo in and you'll see it here on this next slide, um, where it's actually blue.

So that's where you're going to insert your logo. We also have a few places where you, if you need to do a disclosed. Like on the slide here, you can insert your company disclosures here. If you don't need that, go ahead and delete the slide three here, and you won't need to have that one. You'll just use the, the opening slide here.

The other thing you can do is you can also change your color palette here. So under the design tab, if you go to, um, You could change it. And as I hovering over these different colors, you'll see that those are changing colors that will change all the slides, not just the one slide it's showing on a year.

And so that's a great way for you to really, um, uh, customize this. So that's what you want it to be, what you need it to be and, uh, make it what you, uh, what fits

your brand colors the best. So you can change those. Uh, so then you'll take the first. And I'll go ahead and then turn it back to you from that, Steve.

Steve Sanduski: Yeah. So as I mentioned, this is called a new money conversation for couples and the basic idea behind this particular one, as it relates to the fiscal ossify is. As a, as couples, you know, we hope that you're having conversations around money and those conversations might change over time, depending on the stage of your relationship, whether you're newly a couple, whether you've been married for 40 or 50 years to have those conversations.

Uh, we've designed this to really talk about three things. One is to know your goals, to really understand as a couple, what are your money goals? Second is to embrace your roles and what we mean by that is. Does one person take the lead when it comes to the money side and another person has maybe a copilot is, is one a pilot and the others, the passenger.

We'll talk about that here in just a moment. And then the third piece here is really about tell your stories. And of course, you know, here at ROL advisor, we're all about really trying to understand and get your clients stories, because we believe that it's through narrative, that we can really gain a deeper understanding.

Of our clients and of each other. So that's just a little bit of the outline. And then as we get into, uh, some of the meat of the presentation here, We want to start off with some interactivity. And so I love starting off presentations with some kind of poll. And so we've got a couple of questions here, so we call this fun with money.

So this is a great way to get your audience warmed up again, whether you're doing this in person, you can do this, or if you're doing this virtually, you can use the polling feature of something like zoom or whatever system that you happen to be using. And so the first question that we've got here is what's the.

Fun. You've had that costs a lot of money. And then the second one is what's the most fun you've had that costs very little or nothing. And really what we're getting at here is that, you know, money obviously can do certain things for us. And we may have a trip of a lifetime that costs a boatload of money.

Okay. So we need money. Okay. Money is a tool that's going to help us have sort of that trip of a lifetime, but then also there's a lot of stuff that we can do. That's a lot of fun that doesn't cost much money. And so this is just an example of getting people to think about. Sure. There's things that having a lot of money would be really helpful for.

But the reality is there's a lot of fun things that we can do that don't cost a lot of money either. And so it just gets them thinking about what are those things that cost money, what are those things that don't cost money? So again, just a little way to get some inner, uh, activity, uh, Amy, anything you want to add to that in terms of the logistics of doing.

Amy Koenig: Yeah, I would just say, um, as you notice here in the bottom, you probably can't read it. It's pretty small text I'm sure. But in these, uh, excuse me, presentations, we do have some speakers notes here. And so some of it is things you can say, uh, but some of it's instructions. So, you know, if you're doing this virtually, we can actually put.

These, uh, attendees, your attendees into breakout sessions or breakout rooms. And this is how you do that. If you're using zoom, you're training on what other, um, whatever webinars service you're using should have some training on, um, doing that with other services too. If you're doing it in person, um, we can set up to seat up to three couples at each round table, and I would suggest rounds for that as a way to, um, encourage that.

So those would be the two additions I would make to that. Yeah.

Steve Sanduski: So, so this isn't, this isn't actually a poll. The next one's a poll. This one is more of the interactive, uh, working at your tables and having a, a conversation about this and sharing it. The next one here is really more about, um, uh, a poll here.

And this is talking about your some roles here. And one way to discuss this is to use the idea of pilot. Or a passenger in terms of who's making the decisions here. And so we want to ask them which role best describes you when it comes to

making these types of decisions. Are you the pilot? Yeah. One person is the copilot.

So you're making these changes or these decisions together, but one's leading or is it one person is really making the decision and the other one is just along for the ride. So we want to get a sense for who's leading and what the roles are and what the roles are today. Obviously doesn't mean that that's what it's going to be going forward.

Someone may not be happy with the current role. They may, may want to be more involved and that's great. So this just gives us a sense to have some conversation about that as well. So, uh, anything to add to that, Amy? Yeah. Sorry

Amy Koenig: about that. My mouse decided to freak out on me. Um, no, I just same sort of thing.

So I've given you some instructions here and if you're going to do it virtually, uh, just going ahead and using that as a way to learn how to add a poll. I know we've done those a few times on our webinars. It's pretty, pretty straight forward. Um, and basically you can. Launch the poll and then show the results from the poll.

And that's a nice way to then have some discussion. Uh, if you're going to do this in person, I would say a raise hand thing, you know, raise your hand. If you think you are the pilot, raise your hand. If you're thinking you are the, the copilot passenger, and then also same thing with, um, if your money roles were to change.

Um, how do you feel about that? And that gives you a great idea for those people who say, I have no idea where to start. Uh, that's why no working with a financial advisor is such a great way to help you through that process.

Steve Sanduski: And then from there we get into the tool itself. So at this point, we're going to have them go through the fiscal last Sufi.

And Amy, I'll tell you here in a second about doing that in person and the paper version, but essentially we'll have them actually complete the exercise. And, uh,

actually, Amy, this is probably a good time that we do have a paper version, so we can go ahead and pull up the paper version. And so if you are doing this in person, you can actually have printed copies of the paper version of the fiscal ossify, have those laid out on the table.

And then, uh, Amy will tell us logistically how to have them complete that. And then we'll discuss that. So, Amy, I, why don't you just mention here with the paper version, how we interact with. Yeah.

Amy Koenig: So with these paper versions, if you haven't used some of these documents that we've been updating lately, you have the ability to insert your logo and you do have the ability as well to add your company disclosures down here.

So I definitely recommend doing that before you share it with your clients. Um, the way you're going to do this is basically your both clients are going to complete this on one document. So you're going to have one client go through it. If you are doing this in person, you probably want to have some music playing as they're completing these, but the first person they're just going to circle their response.

So as they look at debt, what is our philosophy as a pertains to debt? Do they want to be more debt-free or more highly leveraged? And then what is their comfort level as it pertains to your current comfort level with debt? How comfortable. So the think side is the philosophy. The field side is more that right side.

So once the first person has gone through and circled their responses, give it to the other person and they're going to put a square around it. This is going to allow us that ability to really see, um, where there's higher, um, variances, just like you have with the digital tool. If you've used that in the past.

Steve Sanduski: And it's up to you. If you want to ask your audience to share some of their feedback here. So then we get to the, the next part of the conversation, which is okay, so they fill this out now, what do they do with it? Well, this is when we talk about having them share their perspectives and stories about. Uh, the first part, the first side of the fiscal atrophy, which is their perspective on money.

And what's shaped that what are some of those stories that they can share around them? And then the, uh, the right side is the comfort level. So you can either have people discuss that among themselves. You could have somebody share something with the crowd, if they want totally up to you, how you want to do.

And then, oh, go ahead. Go ahead, Amy. I

Amy Koenig: was just going to say, this is also a great place where the advisor has an opportunity to share a little bit about themselves. So if you haven't gone through the fiscal loss of, for yourself, please do that. So you kind of have an idea of what you learned about yourself, because this is all.

Self-discovery and so what did you learn about yourself? Maybe share a story. Hey, you know, I found out that I really love giving. And what are some of the stories that shaped that this gives your audience the opportunity to get to know you a little bit on a personal level, um, as you're asking them to do some of the same.

Steve Sanduski: Right. And by you going first that in many respects, we'll give the audience, I'm going to say permission. It will also put them at ease. So they're like, oh, if my advisor is sharing this, then maybe it's okay for me to share in front of folks as well. So by you going first will make it easier for the audience.

If you do want some kind of interaction in that area for them to actually share their story as well. All right. And then from there we can roll into what is some of the homework here and for homework, we've got three things that you can offer to them. One is basically ask them, is there a money role you would like to change or enhance?

And so this is something that you can say to them. Um, hopefully we started a really good dialogue here, both with you and your partner, but then also with us as well. So we'd like you to continue this dialogue on the ride home and, and, uh, continue to have that conversation. And then second is to discuss this.

That shaped your financial beliefs. Because as I said earlier, we can really understand a lot about each other by the stories that we're telling and sharing. And

then the third is a call to action in terms of scheduling an appointment with you to go a little deeper with some of these areas as well. So that is a, is it in a nutshell for this first presentation?

And as I mentioned here, a few minutes ago, you can do this live in person. You can do this live virtually, but then you can also record this as a recording. So you could get on zoom, like we're doing here or whatever other system you're using. And you could walk through this whole presentation. It might take you five minutes.

I mean, it doesn't have to take a long time and. And just talk about this. You could put that on your website. You could have the printed version of the tool next to it, where they could download it. So they could actually almost as a self-directed fiscal ossify, they could go through. You're giving them tremendous value and then have your call to action and say, give us a call after you've completed this.

You've discussed this with your partner. Give us a call. We're happy to set up a time and walk through this with you and see how else we might be able to help you. So that would be good. You can also send them the digital. Link to have them complete this. So if they, they could have the option, they could do the paper version.

They could do the electronic version of this as well. So you can make both of those available. Uh, anything else Amy, to add on this one before we move to the next presentation?

Amy Koenig: Yeah, I would say just one of the questions I get often is. Uh, and like you were even saying, if you want to record this, you don't have to use all the slides, take out the slides that aren't pertinent.

If you're recording it and want a short or maybe one or two slides that you want to use, that's absolutely fine. It is a PowerPoint presentation. So it is completely editable. You can make changes to it, use it in the way that's going to best fit you in your.

Steve Sanduski: Okay. All right. So let's move to the second presentation, which is a planning for life's major moments.

So a again, Amy, go through a few logistics here on this one. Very

Amy Koenig: similar. We have the ability for you to add your logo in a few places. If you need to do disclosures, we have a disclosure slide. And as I mentioned before, you can also change your color palette. So that is all available for you to do as well in this one, uh, just to give you that consistency and you will see that the presentations are similar in their presentation.

So if you wanted to do this as, um, you know, kind of all three, if you have fiscal ossify, the ROL index and the financial lifeline, these do fit together as a way for you to present them, um, altogether. And so you could do like three nights, um, something along those lines. The pallet is up to you on what you choose on that.

Steve Sanduski: Okay. So just like the first presentation, we want to start with some type of icebreaker or interactive activity. So for this one, it could be as simple as asking them in which areas of life have you experienced. Change or changes and we're going to avoid COVID or say, Hey, we know COVID changed it for everybody, but, uh, as it relates to, let's say these six areas, what's something else that may have, you may have experienced a change here and we could do this.

If you're doing this. Uh, virtually you could take this as a poll and you could have these six areas as the options for the poll, and you can see the results in real time. You can talk about the results you can ask. If anybody wants to share the change that they had, as it related to this particular result.

If it's in person, you could just simply have them raise their hands. And again, ask if anybody wants to share, maybe you share something as well. Just like we said here a minute ago is you go first and that oftentimes makes it a lot easier for other folks to, uh, to share as well. Once you've already, uh, opened that up, uh, as well.

So anything else to add to this one? Amy? You nailed it. Okay. Thanks. All right. So, uh, so moving on into the presentation, one of the keys that we talk about here

is this idea of goals versus transitions. And for those of you that have been with us for any length of time, you've probably heard us talk about this before in that the way the industry.

Typically works today is it's a focus on goals. Like I've got this goal to retire by age 63, or I've got this goal to save a certain amount of money, or I've got a goal to fund college education. And those are obviously absolutely necessary and important. What we tend to focus on is transitions. So the goals are what you want to happen, and the transitions are what will happen.

Oftentimes advisors start. The goals, but then we, we flip that. And so in our next slide, we talk about actually flipping the process and say, we really want to start with the transitions because the transitions are things that will happen. So let's focus on what we know is going to happen. And from those transitions, oftentimes those may lead in.

Some goals as well, or once we get the transition's figured out, then we can start talking about, okay, well, what are some of the other things that you want to have happen that you proactively want to make sure happen? And then also, obviously the other thing with transitions is there are transitions that we know are coming and that we can plan for.

And then there are transitions that come out of the blue that are unexposed. And so you can prep your clients and let them know that with this particular tool, the lifeline, the segues tool that we want to be your first call in the sense that whenever something significant happens in your life, That is going to have some kind of impact on you or impact on your goals or impact on your life transitions.

We want to be that first call outside of the family. And one of the first things we're going to do is we're going to pull up the lifeline. We're going to pull up the segues tool and we want to see how this transition is now going to impact what we had been planning for. So you become that go-to person.

Whenever something material is happening in their life. And you've got this visual tool to help demonstrate and visualize, uh, how that's going to affect things going forward. Uh, anything else to add to that, Amy?

Amy Koenig: Nope.

Steve Sanduski: I'm really helping us. Um, I'm lobbing you these softballs here. Uh, well I know, but you're

Amy Koenig: covering all the great stuff, so.

Steve Sanduski: Alright. Uh, so the next one here, you've probably heard Mitch say before that money goes in motion, when life goes in transition, I think that's a classic line, a great line that, that, uh, is, is totally true. So, so here we've identified, we've got the six areas. Uh, in life and in, in the transitions and, uh, Amy, I will let you talk about this in terms of, okay.

Now, how do we actually complete this tool, whether we're doing it in person or whether we're doing the virtual version? Yeah.

Amy Koenig: And this goes the same for the fiscal loss of fetal. We just talked about. Actually you're going to want to send these documents to the client prior to if they've registered for the event, send them the, um, any attachments or anything else that you are going to be sharing with the client.

Um, so that's the way you're going to get it to your virtual clients. You could put it in chat and they could pull it up that way as well. So that's another way that you could deliver it to everybody. So if you didn't get it set before you could do it in chat, they can click on it, open it up. Um, the lifeline here, the life events.

This one is a fillable PDF. The fiscal Ossipee is not, um, because of the circle and the square, um, was a little beyond my capabilities. And, uh, so I think that that when you do need to send to them beforehand, so they do have the ability to circle or square or hand write on it. This one though is a fillable.

So again, if you wanted to put that in chat during the, um, during the presentation, you absolutely can again, put your logo in there. Um, or disclosure the bottom and then the client has the ability. If you printed it for them and have it in the center of the table, they can just check off the items. Um, or you can go ahead and they can do it as a fillable and save it and send it back to you even.

Steve Sanduski: All right. Um, so then the next one here is just simply a visual of what the actual lifeline looks like. So when you're giving the presentation, you can show them what that is and give them the directions on how to complete that. And that wraps up that particular presentation. So fairly short and sweet.

And again, like I said before, you can record this as a prerecorded video. Three minutes, five minutes, walk them through again. You can have the paper versions available for them to fill out and you've got different options here, depending on what works best for, uh, your folks there. Um, If you don't have anything else, Amy, would this be a good time to go to the resource center and show folks where we can, where you can access these presentations and where you can access the paper versions?

Absolutely.

Amy Koenig: Uh, so right now I've updated the website. So under marketing, you've got a white label, PowerPoint presentation, and I know this looks a little different, but. Whether you just have financial lifeline or you have, um, access to all tools, you will find a link under marketing and presentations. And that's where you're going to find these, uh, particular doctors.

Again bit, but you see here is what tools you have access to. So, one thing I say is you do still have the ability to present all three of these tools. It's a little different presentation, but when we've had that there for awhile, which is a, what is your return on life? And that's going to be here for you.

What I've done is, uh, we've actually created, you know, the fiscal atrophy we just went through here today. Um, you have, you can expand it by clicking on the little plus sign. You'll have the presentation. You have the invitation that you can share

with your clients as well as the paper documentation. So you could break all three tools up into do the fiscal atrophy.

Then you can go through the ROL index. I have updated that as well, even though we didn't go through that today, that presentation has been updated to fit this format of these. To other presentations. So you have a new presentation here. Um, there is an audio from a previous learning hour that we did. I will be adding this learning hour as well into these areas so that we have those as well for replay, if needed as well as we have a invitation and a paper version for the ROL index.

That's new. So actually, why don't I go ahead and show you that? Well, one as well. Uh, so you have a visual on that. So at the return on end return on life index here, you can put the, have them complete it with their name and date, and then they've just put their numbers in here, you know, so they're going to put their numbers in however they are.

I'm just going to do a couple here. And then that form is actually going to be, uh, completed with their scores. And so on the second page, they can score it themselves. So if you're doing this in person, it gives how to do that. They have to add up all the scores divided by two. If you're doing that as a presentation in person, most people have a phone with the gallery.

But you can have a few on the table if need be. And so it'll automatically fill those in for you as well as give you all of the, okay. So what area was that? That was your lowest. You can use that document to, um, have some prompter questions there for them to review and make some changes in. So that's a new change to that we wanted to make you aware of.

So let me go back to the last one here, then plan for life's major modes. Very similar to what we've gone through. Here's the presentation invitation and in the paper version.

Steve Sanduski: Excellent. All right. So, uh, again, depending on your level of membership here will indicate which of these presentations you've got access to.

So what we're trying to do here at ROL, I would say is twofold. One is we're, we're making these digital tools available to you. That you can have a greater and deeper dialogues with your clients. But then the second thing is, uh, we're, we're trying to help you market as well, because it's one thing to like, have all this stuff available and to be well-trained and be able to have these great conversations.

But if you're not able to get in front of people to have these conversations, then it's really not very useful. And so I really view what we're doing here at ROL is two fold. One is it's about. Life centered planning return on life in helping you get trained in that and be really confident in being able to deliver those conversations and deliver that value in your relationships.

But then the second piece is the marketing side and the practice management side. And so these presentations that we have available here are just one example of the value that we're bringing here. In terms of helping you on the marketing side. So I hope that you take full advantage of this. If you have any questions about these or need some other ideas on maybe how to use these, please feel free to reach out to us.

You can always connect with us and connect with Amy at a support at ROL advisor. Dot com uh, we'll get you straight into us as well. I think many of you already have a direct dialogue with Amy, so you can always reach out to her at any time as well. Um, Any questions, uh, that any of you have, I see Harris has a question here about the segues tools.

So segways and lifeline are the same thing. We just did a little branding, uh, there, but, uh, the segues tool lifeline, those are interchangeable. Those are the same thing, but, uh, Any other questions from anybody, we'll give you all, uh, a second here. Uh, anything else for you to add Amy while we see if anyone has any other questions?

Amy Koenig: No, but I mean, I would love to hear if there are other presentation ideas, other things that would help them with the implement or other tools, a marketing that we can provide that would help with the implementation of the tools with their clients. Uh, please let me know, put that in the Q and a as well.

That would be a great way for us to continue to provide those, uh, tools and resources that are, are most beneficial to them.

Steve Sanduski: Yeah. And, uh, give us feedback on anything, whether it's the presentations, whether it's the tool. Whether it's the value that we're bringing to you. So we want to get better. We want to continue to enhance our offering here.

So if you have any feedback, good, bad, or indifferent, please let us know because we're very receptive and open and be responsible. We'll be as responsive as we can be in terms of trying to continue to improve the program here. But all of you are out there using this every single day. So, you know, what's working, maybe what's not working as well.

So please be sure to make sure you're giving us feedback. Uh, uh, and we're, we definitely want to receive that. Um, got some questions here. It looks like, uh, so Tony, do you plan to update graphic images?

Amy Koenig: I guess I would say, yeah. Which graphics are you talking about there? Tony? I have a guest from conversations we have, but if you want to type another response to the Q and a, that would be great.

So we can make sure we're addressing the right.

Steve Sanduski: Okay. Um, and then, uh, Robert, any updated plans to have another event in person or by zoom? Uh, don't have anything yet that, that we can share there. Amy and I were just talking about that here, right before we, we went on with you, but yeah, we do. Um, we do want to do something, so we'll keep you posted on.

Uh, let's see, Tina says a more of a comment would be helpful to see examples of adviser, websites that have integrated ROL tools and presentations directly on their site. I think we have some of those Amy, so that might be a good, uh, something that we should, maybe we should put that in like one of the weekly emails that we send out.

If we have a few that we could link to, of course, we've got to get permission from those advisors. Uh, for us to share that, but I think we've got some that we could share. So we'll make a note of that. Um, uh, Jerry said, uh, these presentations seem to make it possible to use the share screen feature, to go through the tools in real time.

And I think you could do that, but that would, uh, I mean, you can do this, certainly one-on-one share screen, but I'm not sure that you could have 30 people and do a share screen. So. Uh, Amy, any comments on that?

Amy Koenig: Yeah. That you read it differently than I did. So I was thinking just the presentation, but yes, it does say the tool.

So, um, you could absolutely. Um, if you want to, instead of using the paper version, um, it doesn't give you the interactivity because they won't have a completed it. If you're doing it on screen, unless you have one individual that would be willing to go through that with you. Uh, you could do that kind of a.

Demonstration of the tool and then, you know, discuss the results to maybe encourage others to have interest in doing it for themselves or doing it with you themselves. You could absolutely.

Steve Sanduski: Okay. Um, and then, uh, Ashok is asking, uh, could there be some sort of disc or Myers-Briggs analysis to see if the client and advisor are a good fit for this process?

Um, I think you could use those. I'm not so sure that either one of those particularly would tell you whether they're open to having a life centered conversation. I'm thinking maybe a simple way to do it is you could early. The conversation with them. You could say something like, um, and, and we've got a whole series of questions.

And maybe while I'm speaking, Amy, maybe you could go in, I know we've got, we did a learning hour on like the, uh, the variety of questions that you could ask related. And maybe it's one of the marketing tools, uh, questions that you can ask

related to each of the tools. So we've got a good list there, but I mean, something as simple as, um, you know, I, I, in order for me to know.

Have a conversation with you or to really guide you on your financial situation. It's really important for me to have a better understanding of, of where you've been, where you're coming from, where you're at right now. So, uh, if you don't mind, I would love to hear a little bit about what money was like growing up for you.

So even a question like that, if they just dismiss it, then you can be pretty confident that they're not really interested in having this kind of conversation, but if they get really excited and their eyes light up and they go on for 10 minutes telling you about what money was like growing up, you can be pretty sure that they're interested in this.

So I think just coming up with a simple question or two related to this will tell you just how open they are. And then if they are open, then you can say, well, you know what, this is really good. This, you know, I happen to have an exercise here that I think would be really helpful for us to go through. So I think that could be helpful.

So, uh, yeah, it looks like Amy's got that hold up here. So, uh, yeah. Why don't you tell us where, where you found that

Amy Koenig: Amy? Yep, absolutely. Actually part of the training. Um, so when you're in. I need to go back out. I kind of went through that quick as you were talking, not that was the one I wanted to go. So if you're under training and fiscal ossify, uh, have a lot of these under each of the, using the fiscal stuffy, um, role.

So if you watch the fiscal loss, if you role-play, we have scripts under there. And some that's where I found that particular document right here.

Steve Sanduski: Okay. So. Okay. Okay. All right. Uh, Joseph's asking, is there a best practice timeline of when to send out the PDF, et cetera, to clients before presenting the tool in our beatings?

Do you have any comments on that, Amy?

Amy Koenig: So I'm guessing you're meaning outside of the presentation itself. So just the best practices for sending out the. Like you said you could use a paper document instead of the links. Um, you know, it's very dependent upon your own processes, but I would say if you've set a meeting up, let's say for a prospect being a, and you want to have them complete the fiscal ossify before you meet, I would say as soon as you've scheduled it, get that out to them so that you can send a reminder if they haven't completed it before the meeting.

Uh, so get it in their hands as soon as possible. Um, you know, why you want to, um, ask them to complete. We do have, don't forget in the, uh, resource center do have a number of, uh, email texts that you can use under marketing. Again. Um, there's some marketing communications for those, with us lifeline. You're not going to see the marketing communications.

We don't have those created yet, but there is some out here for the ROL index or those sorts of things.

Steve Sanduski: Okay. And, uh, Tony commented here about the graphic images, the sun hand, and the globe. So I think that was the original visuals that we had, and that may have been on a paper version of one of the tools.

So, so, uh, we got you there toning. Okay. Appreciate that. Uh, Brian's asking, will this be recorded and available to listen to later? Yes, it will. And, uh, Harris in terms is, is asking the order of delivering these. So for those of you in the full program that have the fiscal ossify, the ROL index and the lifeline.

Oftentimes people will say, okay, well, which tool do I start with? And, uh, we've said that you it's probably, you know, you can start with any of them to begin with, but I know Mitch very much encourages folks to start with the history, which would be the fiscal ossify. So he very much is in favor of, uh, trying to get their history, becoming their biographer, and really trying to understand where they've been.

So he certainly encourages folks to start with the fiscal ossify. And that's great. Uh, you could start with the ROL index, maybe more from a marketing standpoint, uh, as well, that might be an easier one to get going. So, uh, but either way. Uh, but I know Mitch definitely favor starting with the fiscal officer.

And, uh, Katherine, uh, is, is signed up with the, uh, the segues program and, uh, that gives access to the lifeline, uh, but not the fiscal ossify or the retirement program or the ROL index status. Correct. And then, uh, Craig is asking any plans to add a disc assessment to the. Um, at the moment we don't, uh, but it looks like maybe we've had a couple of questions on that here today about having some type of profiling, uh, personality type profiling system available.

So we'll make a note of that and look into that and see if there might be something that would be compatible with what we're doing here at ROL. So, uh, that's all the questions I see at the moment. And, uh, So I think we'll wrap there. So again, appreciate all of you spending some time with us here today.

We'll give you back another 22 minutes of your day and the next learning hour is going to be on in April. And Amy is quickly trying to pull that slide up. I know

Amy Koenig: April

Steve Sanduski: 21st. Yep at noon Eastern. So we're going to do another deepening dialogue. And you may recall in January and February, we did deepening dialogues and these are really fun.

And what we're doing with those is we're going to start with a question and this would be a question that you would be asking your clients to, uh, to go through as part of our process. And now we want you to do it. In interaction with other members of the program. So you can really be the recipient of that and know what it feels like and go through that yourself.

You'll have the opportunity to do that. We'll put you in breakout rooms, typically about four or five in a breakout room. You'll have the opportunity to dialogue

among each other. We've gotten really good feedback with them and it's clear that all of you like to be in conversation with each other. So we're going to continue.

To do that for the foreseeable future. And we will be back in action without an April 21st hope you all can join us. And again, any questions that you have, you know, how to reach us. And I appreciate y'all being part of the program. And if you know anyone else that you think would be a great fit for ROL advisor, uh, please make sure that you, uh, send them our way and we would be happy to receive any referrals in thank you in advance for that.

All right. Thanks everybody. Take care. And we'll talk to you.