# Sales Strategies for Financial Advisors – Table of Contents

The program has been divided into three sections, Sales, Marketing and Motivation.

There are 281 videos, 106 audios, 12 eBooks and 7 Sets of Scripts

What the colour coding means:

**Videos** 

**Audio** 

**EBooks** 

**Scripts** 

# **Section 1 - Planning**

#### Introduction

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- How the Icons Work and What they Mean
- Changes in Business
- Advantages of Selling
- Characteristics of Successful Financial Advisors
- 3 C's of Success
- Interview with Mehdi Fakharzdeh
- CASH Part 1 Comprehension & Attitude
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- Maximizing your Prospecting Time
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- The Keys to Working from Home
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- is for Optimization
- Optimize your LinkedIn Profile
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- Zoom Strategies when Presenting
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- Prospecting Methods
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- Setting Objectives
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- Allan Pease Interview on Telephoning
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- NLP & Referrals
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- The Elevator Speech
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- Swap Meetings
- Your Marketing Machine
- Newsletters
- How to Market & Promote Yourself
- Selling to High Net Worth Clients
- Working with Top Executives

- Contacting Top Executives
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- Seminars & Presentations
- Planning your Presentation
- Planning your Presentation Part 2
- Planning your Presentation Part 3
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- Interview with Top Producer Brent Walsh
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- How to do Advanced Searches for Free
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- Crystal Knows
- Messaging & Notifications
- Advanced Features of LinkedIn
- How to use Groups on LinkedIn
- How to Carry out Searches on LinkedIn
- Example of a Good and Bad Inmail
- How to Connect
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- How to Post and get Thousands of Views and Comments
- How to Follow up after Someone has Viewed your Profile
- LinkedIn Requirements for a Company Page
- Setting up your Company Profile
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**End of Program**