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 color coding means:

Videos	
<mark>Audio</mark>	

- **EBooks**
- **Scripts**

Section 1 - Planning

Introduction

- Welcome and Introduction
- 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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- E is for Establishing Credibility
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- Allan Pease Interview on Telephoning
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Prospecting

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- NLP & Referrals
- Referral Champions
- Referrals Exercise

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- The Elevator Speech with Olympian Ian Rose
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- Your Marketing Machine
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- How to Market & Promote Yourself
- Selling to High Net Worth Clients
- Working with Top Executives

- Contacting Top Executives
- Workshops for High Net Worth Clients
- Seminars & Presentations
- Planning your Presentation
- Planning your Presentation Part 2
- Planning your Presentation Part 3
- Workshop Outline
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- Interview with Top Producer Brent Walsh
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- Your Ideal Client
- Advanced Google Search Case Study
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- Boolean cheat sheet

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- Changes to LinkedIn
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- Setting up Your Profile
- Completing Your Profile
- Optimizing each Section of LinkedIn
- The Home Screen
- How to Add & Optimize Articles for LinkedIn
- How to do Advanced Searches for Free
- Your Network
- 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

Your Templates PDF

- 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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- Pre-call Planning
- Pre-call Research
- Pre-call Planning Tools to Use

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- Past, Present, Future
- The Ben Duffy
- Advanced NLP Techniques to Develop Rapport
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- COPE
- External Sources for Finding Great Headlines
- Headline Analyser
- How to Analyse your Blog Headlines
- Critical Elements for a Successful Article
- Where to Find & Spin Articles
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- The 14 Steps to Sharing your Articles
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- Practical Article & Blogging Exercise
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- Why use Video in Business
- Thai Insurance Emotional Video
- Factors to Consider in Planning your Video
- Essential Equipment Cameras & Other Recording Devices
- Using the Iphone & Ipad for Filming
- Using the Ipad to Film in Dubai
- Autocue and Add-ons
- Video Editing Software Recommendations
- How to use Camtasia
- How to use Greenscreen Effectively
- Other Software You Can Use
- Video Convertors
- Video Resources Guide

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- Video Testimonials
- Example of a Video Testimonial
- Video Testimonial 2 Joey Imossi
- Using Video Ask
- How to Showcase your Service
- Promoting Events with Video
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- Video Contests
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- Example of a Financial Services video
- The Eight Steps in Creating a Sales Video
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- Success Story with Emotion Financial Services Example
- The Humorous Sales Video
- 'How to' Videos
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- Company Culture in Financial Services
- Online Training Courses
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- Meet the Experts Financial Services Example
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- Video Email using Vidyard
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- Where to get Copyright Free Media
- How to Add Endings and Calls to Action
- Using Promo
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- How to Turn Articles into Videos
- How to Add Captions to Videos

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- Video Thumbnails
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- Liking, Linking & Comments
- Sharing your Videos
- How to Share your Video at a Specific Time
- Uploading to LinkedIn and Facebook
- Video Sharing Sites
- How to 'Kick-Start' your Videos
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- Your Channel's Look & Feel
- How to use Creator Studio
- How to use Creator Studio Part 2
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- Where to Find Great Graphics for Facebook
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- Twitter Tools & Analytics
- The Twitter Glossary
- The Twitter Toolkit Ebook
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- Pinterest in Action
- Pinterest for Business
- Companies Using Pinterest
- Financial Services Examples
- Pinterest 10 Take Aways

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- 19 Social Media Tools
- 160 Content Marketing Tools for your Business
- The Best Time to Post on Social Media Ebook

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- It's All About You
- Winners & Losers
- Setting & Achieving Your Goals

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- The Circle of Life PDF
- Identify your Goals
- Interview with W. Mitchell
- Believe in your Dreams & Goals
- Rules for Goal Setting
- Stories of Great Goal Setters
- Interview with Alvin Law
- Your Goal Setting Workbook
- Goals Workbook

How to be more Confident, Assertive and Happy

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- What is Confidence
- Where Does it Start
- The Fear Factor
- Self-Talk
- Personal Power
- Tips & Tricks
- Assertiveness
- Assertiveness in the Workplace
- Letting Go
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- Dreaming & Believing
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- Business Practice
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- Delegation
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- Perseverance
- Self-Development
- Honesty & Integrity
- Self-Responsibility & Attitude
- Life Balance

- Change, Belief & Focus
- Fun
- Quotes from Tigers

End of Program