Ed Howat, Jr.
CLU, ChFC, LUTCF, RCC

Ed Howat has been a sales trainer and coach for the past 14 years. His primary focus is coaching financial advisors and sales managers. Ed started his career with Northwestern Mutual as a Special Agent and then moved to sales management as a District Agent. Ed then joined Manulife Financial, holding positions as an Agency Manager, Wholesaler and Sales Training Director. He later moved to Nationwide Financial as Field Training Manager and worked with wholesalers and sales managers.

Ed believes that it is important for experienced, successful people to mentor the next generation of financial planners by passing on knowledge and skills.

Experienced people need to take on the role of "elder" and help people succeed. It is up to those who have enjoyed and prospered from their careers as financial professionals to pass on their wisdom, knowledge, experiences and insights.

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Addie Woods Consulting Co

The Wealth Management Coaching Program

Helping you do the things you haven’t done…

651.405.6644

WEALTH MANAGEMENT

Wealth Management is more than just a financial plan. **It is about understanding your clients' lifestyles, their hopes, dreams, needs, and wants.** Wealth Management starts with a conversation about life. Where have they been? Where are they going? What events do they need to deal with now and in the future? What promises have they made to themselves, their families and their business associates? As a true Wealth Manager, your job is to help your clients do the things they haven't done and to help them keep their promises.

Would you like to control 100% of your client's investible assets? Is your practice in shape to attract all of your client's investable assets? The true wealth manager is involved in every aspect of a client's financial life. Are you prepared to discuss: risk management; insurance; cash flow and debt management; estate and tax planning; and lifestyle and legacy planning; and educate the next generation of wealth?

THE WEALTH MANAGEMENT COACHING PROGRAM

Expanding your business into more areas of your clients' lives is the goal of the Wealth Management Coaching Program. Unlike most coaching and learning programs which are usually just events, this program is loaded with practical information and activities that will keep you coming back for more. It is a program that provides you with the knowledge, information, insights and processes that you need to do your job every day.

Group Coaching provides economies of scale, providing content, context and exceptional coaching for a fraction of the cost of one-on-one coaching. And outcomes focus on studying and committing to best practices that increase market share and grow revenues quickly!

This program consists of 12 webinar/ teleconferences. **Sessions include three one-on-one coaching sessions and nine group teleconferences.** Each 90-minute group call is limited to six people so that there is plenty of time to engaged each participant in the material as well as time for sharing best practices.

PROGRAM TOPICS INCLUDE...

1. **The 12 Characteristics of a Top Performing Wealth Management Practice.** What capabilities, products, services, resources and support do you need to attract your ideal clients?
2. **The Business Plan.** Learn how to build a business plan that is aligned with your mission, vision, values, goals and daily activities.
3. **Clone your top 20 clients.** Learn how create your Ideal Client Profile and double your production, work fewer hours and have more fun.
4. **The Wealth Management Blueprint.** Learn how to effectively cross-sell your clients, capture more assets and increase your net revenue per client.
5. **The Client Advisor Agreement.** Learn how to set expectations and teach your clients to be good clients.
6. **Effective networking with other professionals and wholesalers.** Learn how to build an external team of accountants, attorneys and other advisors. Learn how to segment your wholesalers to leverage your time and resources.