



BENEFITS OF HERITAGE DESIGN FOR PROFESSIONAL ADVISORS¹

The bottom line is that Heritage Design work will build deeper client relationships and increase business, quality introductions, client retention and sustainable streams of revenue for professional advisors.

1. Most professional advisors desire to engage more “A” clients and/or build deeper relationships with their exiting “A” clients. And, many desire to work with fewer, more affluent clients.
2. Clients (particularly affluent clients) want to be completely heard, want to be understood, want to understand how what you do directly relates to what they have said, and want to help (and not hurt) their children and grandchildren. Many also want one advisor to coordinate the efforts of all of their advisors.
3. Advisors who listen to their clients and know their clients’ entire story and core values receive more business and introductions from their clients.
4. Retention of clients is more dependent on your relationship with the clients than on your performance.
5. Inheritors rarely keep their parents’ advisors.
6. Through The Heritage Process™ you will learn fulfill your clients’ demands by listening and understanding their story, life lessons, values, standards, principles and desired outcomes, and by relating what you do for them directly to their desired outcomes. You will also learn how to help them create common vision and a culture of communication, trust and mentoring in their family which will help their children and grandchildren thrive.
7. The Heritage Design Professionals™ Coaching Program will prepare you to deliver The Heritage Process and other services your “A” clients demand.

¹ Please contact us or visit our website for supporting documentation.