Your Retirement Quest *Financial Services Firms—Products/Services*

We offer a wide range of products and services to benefit both your clients and your firm.
Client Education:

- ✓ Book
  - *Your Retirement Quest* provides clients with the concepts and tools they need to plan the non-financial aspects of a fulfilling retirement
  - Many advisors provide a book to both current and prospective clients
  - 25% volume pricing discount
- ✓ Life Planning Workshops: We will customize our core workshop for you to meet your business objectives and time constraints
- ✓ Highlights Video
  - You can provide access to this 45-minute life-planning video to current and prospective clients
  - You get a link to a page that is customized to welcome your clients to YOUR page, and you get a personalized password to provide your clients with access
  - Engaging video describes the key concepts and tools of retirement life planning
- ✓ Webcasts
  - We will customize webcast presentations to meet your business objectives and time constraints
  - You manage the webcast technology and invitations—we provide the content
- ✓ 1-1 Coaching for Key Clients
  - Through Keith Lawrence's certification as one of but a few certified retirement life coaches, we have access to a proprietary on-line retirement readiness assessment tool
  - Use of the tool by a key client is followed up by a personalized debriefing session and coaching to develop a meaningful retirement life plan

Other Services

- ✓ Life Planning Training for Staff: Your advisors and other staff members will be able to build even deeper relationships with clients when they are more sensitive to the personal needs of the clients and understand the concepts and tools of retirement life planning
- ✓ Client Engagement Training with Guidebook
  - This training can supplement Life Planning Training to help your advisors and other staff engage with clients at an even deeper level
  - Each attendee gets his or her guidebook to use as an ongoing life-planning reference
- ✓ Workshops Customized for Targeted Companies
  - You may be targeting local companies, large or small, to gain access to their employees.
  - We will customize our core workshop to help you further differentiate yourself with these companies as a financial firm that cares about their employees holistically, not just about their money
- ✓ Life-planning Marketing Booklet
  - We will provide you with the content of a marketing booklet to introduce your commitment to life planning to prospective and current clients
  - You can then customize the marketing message with your firm's branding
- ✓ Newsletter Articles: We will author articles for your periodic newsletters for clients, customized to meet your business objectives

Customized Programs for your Firm

You can think about the products/services described above as a menu from which to choose to best suit your particulate business objectives and plans. We will work with you to best differentiate your firm in the competitive marketplace.