Client Retention

Quantum

Financial Advisor **Ally**™

Your Ally As You Bring The 5 Money Personalities™ To Your Clients

Powered By The Money Couple®

PUT AN END TO CLIENTS' MONEY SECRETS ONCE AND FOR ALL AND BECOME THEIR ADVISOR OF CHOICE

There's more to financial planning than simply offering investing options and strategies. Words truly matter to clients and they want to be heard on a deeper level. With The Money Couple® Personality Assessment, you'll learn how to reveal clients' hidden money beliefs using behavioral finance, add value and lead discussions that could change their lives.

With The Money Couple® it is possible to increase AUM from your existing base by investing in them first!

- RE-ENGAGE THROUGH ONE-TO-ONE MEETINGS
- SHARE THE MONEY PERSONALITY ASSESSMENT AT CLIENT APPRECIATION EVENTS
- USE THE ASSESSMENT TO REVIEW CLIENTS' NEEDS AND GOALS

This innovative program includes training, seminar materials, client assessments, and your own landing page.

Clients won't forget the positive impact you made in their relationship, and we know they'll tell their friends.

Advisors with a Quantum Partnership also qualify for a Special Offer!

Go beyond just a financial plan when you freely give something of unique value that improves clients' relationships while you gather up more AUM!

Contact Scott Drake to learn more.

T 800.440.1088 | O 480.949.1088

sdrake@thequantum.com