

Talbot's Advisor Workshops

Smart Debt Business Systems for Top Producers

This workshop is a unique combination of client-first strategies, and more importantly to top producers, cost-effective marketing systems to deploy them to increase an advisor's business. Become a top producer by learning ...

- Strategies to increase investable cashflow
- 12 Smart Debt investment strategies to accelerate wealth for any risk tolerance, adding tangible client value (important during compensation discussions)
- Two NEW, common sense strategies to outperform the market, appealing to cautious investors would never borrow to invest
- Turn "negative" market downturns into a positive story and opportunity
- A decision framework for cost-effective marketing decisions
- A "Help a Friend" referral system to efficiently attract and educate prospects
- A behavioural coaching framework to increase business by serving instead of selling

Smart Debt Strategies to Increase Wealth

Debt is a vehicle that can help or hurt, depending on how it is used. Learn Smart Debt strategies to help clients increase wealth and security, including:

- An overview of 12 Smart Debt strategies
- Two "Can't lose" investment debt strategies
- Increase RRSP contributions by 25-85% by "not putting dry pasta in your RRSP"
- Two NEW, common sense strategies to outperform the market
- Is some investment debt better than none?
- Questions to help clients and advisors benefit from the next market downturn

Maximize After-Tax Retirement Income

Winning the Consolidation Race as Boomers Retire

- how "retirement income specialists" will grow their business while boomers consolidate retirement assets, moving assets from advisors who cannot meet the more complex retirement income planning needs of their clients
- strategies to maximize after-tax retirement income or after-tax estate values
- when dividend funds, equities, and income trusts are better outside of RRSPs
- more effective portfolio sheltering and withdrawal strategies
- understand the "hidden tax" of clawbacks, and the impact on investors
- how the overlooked behavioural factors can be most important

Cost-Effective Business Development

Most advisors are essentially self-employed, but do not run their business like a business. This workshop focuses advisors on "knowing your numbers" to make cost-effective decisions related to the use of limited time and money. Integrating the industry's best ideas in the areas of positioning, focus, systems, and referrals, this workshop is ideal for advisors in the intermediate phase of business development (1-5 years).

For more details, go to www.TalbotStevens.com or call (519) 663-2252.