

OUR SIGNATURE PROGRAMS

"Don't let trillions in assets walk out the door."

Designed to strengthen the Financial Advisor's connection and engagement with female clients and prospects and inspire women to take a more active role in their financial futures. **Give her reasons to stay and be the Advisor women move to.**

FOR FINANCIAL ADVISORS

"Every Advisor needs to hear this."

Increase assets, revenue, referrals, retention, and next-gen relationships by forming deeper connections with female clients and prospects. Our **Financially Empowered Series** features 3 Client Guides, Action Plans, Worksheet, and Playbook. Customizable by needs. CE credit for CFP[®], CIMA[®], and CPWA[®].

- Available as a series of three 30-minute sessions or a single 1-hour presentation. Virtual or live.
- All Team members encouraged to attend.

FOR CLIENTS & PROSPECTS

"My millionaire sister knows nothing about investing - she needs this."



The Road to Empowerment presentation inspires women to engage in their financial lives through a fresh approach to understanding the importance of planning and the value of professional advice. Women leave with greater peace of mind knowing steps to plan for life's ups and downs.

Includes invitation, Client Guides, & Action Plan (Co-branding available). Virtual or live.

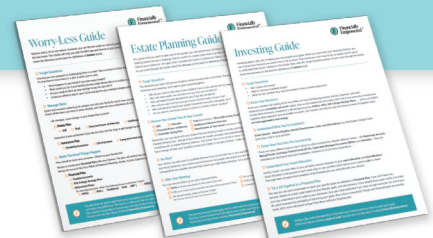
FINANCIALLY EMPOWERED GUIDES

Each Guide covers key areas of opportunity with targeted **Ask HerSM** questions, Act Now Section and Glossary, plus a 5-step Action Plan.

Investing Guide - Walk her through investing basics and create a Plan. It's about connection and business growth.

Estate Planning Guide - Lead with Estate Planning. The deeper discovery delivers stronger connections and asset retention.

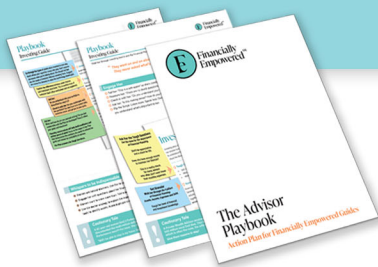
Worry-Less Guide - Plan for what worries her most. When she gains peace of mind, the Advisor gains referrals.



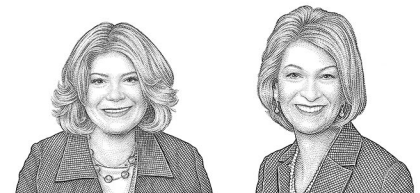
THE ADVISOR PLAYBOOK

Provides practical insights, strategies, and an Action Plan to onboard and re-engage female clients and prospects.

We show you how to **GO THERESM**!



"My wife will leave our Financial Advisor in a heartbeat after I'm gone. She doesn't have a relationship with him, and he's made no effort to communicate with her!"



Joy Prefer Cohen **Linda M Sherman**
The Women Whisperers of Wall Street[®]

www.financiallyempowered.com

What Everyone is Saying

MANAGEMENT

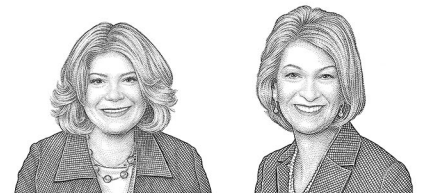
- *"All of my Advisors **need** to hear this presentation!"*
- *"If Advisors don't **engage more effectively** with women, we have no future."*
- *"Financial Planning, a major focus of ours, is addressed in a **proactive** way."*

SPECIALISTS

- *"**Relevant and engaging**. Super impactful!"*
- *"Love the **tie-in with our firm** resources."*
- *"Content and delivery are **fresh in a sea of sameness**."*

ADVISORS

- *"Masterful. **Light bulb moment** for me."*
- *"The program resonated with me to go **deeper with planning**."*
- *"I've wanted to include **women in more meetings** and now have fresh angles."*
- *"Impressive. So much **useful information** in just 3 Guides."*



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