



## **Myths and Mistakes that Sabotage Client Relationships**

**Do your clients stress about making money decisions?**

**Do they ask for tax and estate planning when what they really need is a holiday?**

**Do they expect you to provide them with the magic pill to rescue their retirement?**

**Do they nod in agreement, yet stare blankly when you present your recommendations and reviews?**

You can help clients reach their goals and build your business at the same time with a sequence of simple steps that uses financial education and a new way to view professional alliances as tools to build stronger and more profitable client relationships.

By combining the psychology of wealth with universal financial planning strategies, your clients build a solid foundation of skills and a wealthy mindset. With the MoneyMinding marketing and client development system, they also learn how to access support from certified MoneyMinding Advisors, like you, to receive exceptional results – beyond expectations!

**MoneyMinding** Founder and CEO Tracy Piercy, CFP hosts an eye-opening presentation packed with information you can immediately use with your clients to build their financial literacy, their loyalty, and referrals to you. Whether you are new to the industry or a veteran advisor, in 90 minutes, you will take away the reasons so many people stress about money issues (whether they have money or not) and what you can do to help them overcome that struggle. In the process, you will secure more loyal clients and more profitable relationships.

### **Money Myths and Mistakes:**

- Demonstrates how conventional money wisdom actually keeps people stuck
- Examines how focusing on product features or check-marked lists can put up barriers to communication between you and your client
- Shows how you can help your clients move forward easily, successfully and systematically
- Offers tools to strengthen your business relationship with your clients by guiding them through the simple sequence of steps that is the power behind the MoneyMinding System

### **Financial professionals attending Money Myths and Mistakes have said:**

*"It's about time we saw this type of fresh material."*

*"Relationship skills are missing from the current financial professional teaching. Money Myths and Mistakes is bringing that back."*

To find out about participating in this program by web access, or to host one for your office, call Tracy Piercy, CFP at MoneyMinding: 250-592-0457 or 1-877-764-6444 or email [tracy@moneyminding.com](mailto:tracy@moneyminding.com). For more information: [www.moneyminding.com](http://www.moneyminding.com)