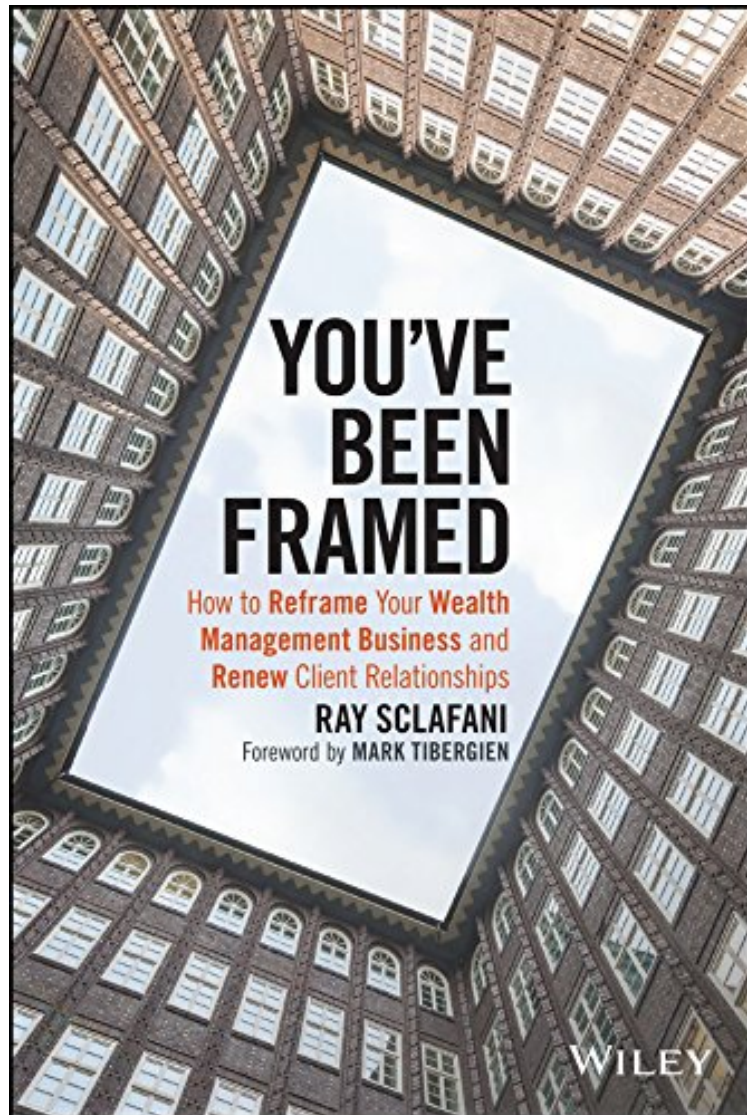


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# You've Been Framed: How to Reframe Your Wealth Management Business and Renew Client Relationships

*Ray Sclafani*

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Reframe "wealth management" to achieve sustainable success in financial services You've Been Framed trade; is a step-by-step guide for achieving ultimate profitability and sustainability for your financial advisory firm. Whether you're a savvy entrepreneur ready to dominate your competitors, or a more experienced advisor moving toward selling your practice, this guide will help you proactively reframe your business. You'll learn how to grow your pipeline of prospects, win the next generation of clients, and deepen your business so it can thrive without you dash; leaving you free to pursue what matters to you. Build your business on a holistic foundation of wealth management and assemble the team that will take you to the top as you develop a whole new perspective from which to offer your services. Transform your role from "directive advisor" to "trusted advocate." Completely shift the paradigm, and make yourself the de facto solution to your clients' wealth management issues. Whether it's the firm with which you're affiliated or the types of products and services you offer, you've been "framed." As a wealth management advisor, your clients have little understanding of what you do or why you do it. Even your team may have the wrong idea. This book helps you clarify and demonstrate the value of your knowledge and skills, so you can frame your work on your own terms. Build and showcase your enterprise value Renew client relationships and attract new demographics Become a leader with proven team-building tools Shift your role from advisor to advocate If you haven't effectively led discussions to co-create what your business stands for dash; and what differentiates it from competitors dash; you're losing talent, prospects, and business. You've Been Framed trade; gives you the perspective you need to thrive in the new financial environment, and achieve sustainable success.

From the Inside Flap Have you been framed? The frame is the perspective outsiders have of your company. It may be accurate or false. Positive or negative. But if you haven't actively nailed down what your business stands for—and what differentiates it from competitors—you're likely reducing profits, talent, and the longevity of your firm. You've Been Framed gives you a process for taking control of your firm's frame to attract prospects into your pipeline, win the next generation of clients, and deepen your business so it can thrive long into the future. Written by the founder of the premier coaching and training company serving the financial services industry, this hands-on guide gives you everything you need to ensure the public sees your company according to your desired frame and not one they've constructed. Whether you want to sell your firm for the greatest return or watch it prosper in the hands of a successor, this tested and perfected five-step system walks you through creating a powerful new frame to meet the goals for your practice by: Determining how you are framed by current clients Exploring what you'd like to be known for and matching it with your clients' actual needs Creating a marketing story to communicate your new frame Reengaging your clients with the new story so they can rediscover your firm's services and become apostles of your brand Building a network of trusted professionals who can deliver on your promises and be brand promoters The book provides readers access to the eXchange trade; a first-of-its-kind online platform that provides free proprietary content developed by ClientWise and access to a network of top financial professionals and the world's highest-credentialed executive coaches who are open to chat, brainstorm, answer questions, and share insight to make sure you don't have to go it alone. Picture how good your business can look after a conscious reframe. From the Back Cover Praise for YOU'VE BEEN FRAMED "Today's wealth advisory market is a dichotomy of challenge and opportunity. While wealthy American families have a greater need now than ever before for financial advice, they are also more empowered than ever to judge the quality of their advisor, and they have more options than ever before to replace someone not meeting their needs. In this context, Sclafani's thesis in You've Been Framed provides vital groundwork and insight for aspiring advisors in any channel to better define dash; and deliver upon dash; their value proposition for clients. The ideas in this book are actionable, astute, and incredibly useful. Bravo!" dash; Sterling Shea, Managing Director, Head of Advisory Programs, Barron's "Who's more important to an advisory firm's growth: clients or staff? Ray Sclafani provides the surprisingly nuanced answer plus the strategies to propel a firm's constituents toward shared success." dash; Jamie Green, Editor, Investment Advisor and ThinkAdvisor.com "It's never too late to become even better at your craft. Financial advisors at any stage of their career, in any business model, need to reframe for tomorrow. You've Been Framed is a comprehensive collection of best practices for reframing for success in a changing industry. It will coach you through the transition to build a lasting foundation, while Sclafani's perspective and passion will accelerate your professional and personal success!" dash; Craig D. Pfeiffer, Founder CEO, Advisors Ahead, LLC "Northwestern Mutual's wealth management advisors strive to be at the center of their

clients' financial lives, and Ray Sclafani helps them get there. He understands building relationships that carry forward through multiple generations, and he shows top advisors how to make a real difference in the life of the client. Advisors who are driven to do meaningful work can learn from Ray." —Beth Rodenhuis, Sr. Vice President, Field Strategy Services, Northwestern Mutual

About the Author RAY SCLAFANI is the founder and head of ClientWise, the premier coaching and training company exclusively serving the financial services industry. He holds a Professional Certified Coach designation from the International Coach Federation and a master's certification in Neuro-Linguistics from the International Association for Neuro-Linguistic Programming.