Powerful Communication. Measurable Results.

The Certified Financial Services Coach Training Program™

clientwise™

GET **CLEAR**. GET **FOCUSED**. GET **RESULTS**.™

ClientWise presents

The Certified Financial Services Coach Training Program™

A Coaching Program that teaches the best in Communication and Relationship Skills

Most successful financial services professionals possess the technical skills and qualifications necessary to help their clients and colleagues maneuver in a fast-changing market and professional environment. In a business that is built upon relationships, knowledge of communication skills is just as important, if not more so, than technical skills.

Building potent relationships is one of the most crucial, and at the same time, one of the most neglected skills in a financial professional's arsenal. Among the most effective communicators, relationship managers, and listeners are professionally trained coaches. Taught how to be completely present with others, to listen actively, ask powerful questions, and partner with clients to solve problems, coaches possess a unique and vital skill set that has the potential to resonate deeply in the rapidly-evolving financial services environment.

Coaching skills greatly enhance the financial professional's ability to build significant relationships. Acquiring such skills enables advisors to listen at a new level to their clients, customers, and colleagues, to ask incisive and challenging questions that will bring important issues to the surface, and empower others to become complete partners in creating their own success.

ClientWise has built a unique coaching skills training program specifically designed with the financial professional in mind. **The Certified Financial Services Coach Training Program™ has been designated by the International Coach Federation (ICF) as Approved Coach Specific Training Hours (ACSTH).** The program is crafted to help the financial services professional —including financial advisors, financial leaders, wholesalers, broker/dealers, asset managers, insurance agents and executives—learn and harness a powerful set of communications tools that will enhance their relationship-building and management skills.

Overview

An in-depth, 60-hour long coaching training curriculum developed for financial professionals who are committed to becoming effective communicators, successful relationship managers and great coaches, this complete training program teaches the full range of coaching skills. Built around the International Coach Federation (ICF) core coaching competencies and code of ethics, this program integrates in-person workshops and teleclasses to educate financial professionals in new and potent ways to deepen presence, listen, question, communicate directly, and partner with associates, direct reports, supervisors, clients, and other stakeholders. The course also covers specific coaching tools and techniques that will advance each participant's communication skills.

The participants receive in-depth mentoring and feedback on their coaching skills. Most importantly, this coach training program is specifically designed to teach coaching skills through situations and conversations that financial advisors, leaders, and professionals deal with every day. It is the only coach training program fully customized to the financial professionals' real world.

Benefits

Upon completion of the coursework, financial advisors, leaders, and executives who enroll in The ClientWise Certified Financial Services Coach Training Program™ will have the ability to:

- Partner with clients, team members, stakeholders, and others in a profound way to advance organizational goals
- Communicate skillfully to break down barriers and understand the positions and beliefs of others more fully
- Build consensus among team members to achieve vital goals and objectives
- Ask challenging questions that will bring important issues to the surface
- Begin the process of becoming an International Coach Federation (ICF) Associate Certified Coach (ACC)

Curriculum

During a six-month period, participants will meet with Master Certified Coach (MCC) and ClientWise Chief Program Developer Margaret Krigbaum, JD and Sophia Harbas, Director of Coaching Services for a two day class at both the beginning and the end of the program and weekly 90-minute teleclasses attended from your office or home. Each module contains ample opportunities for practice around financial services industry specific issues related to communication skills, partnering skills, and coaching.

Module 1: Overview of Coaching includes foundational coaching skills, the coach's job description, and the difference between coaching and other business roles.

Module 2: Active Listening covers crucial coaching concepts for active listening, active listening exercises, and listening for behavior patterns.

Module 3: The Coaching Session outlines the structure of the coaching session, the coaching process, creating accountability, and establishing agreements.

Module 4: Powerful Questioning encompasses the definition of powerful questioning, creating open-ended questions, and creating customized questions.

Module 5: Direct Communication and Truth includes the relationship between direct communication and active listening, the power of customized observations, and the three types of truth.

Module 6: Designing Actions and Accountability covers the coachee-driven planning process, actions that move the coachee forward, and the difference between powerful actions and incremental actions.

Module 7: Going Deeper includes advanced understanding and use of coaching skills related to helping people advance toward greater success.

Module 8: Advanced Coaching Skills and Techniques encompasses the understanding and use of advanced coaching skills to help ideas turn into powerful reality.

Modules 9 & 10: Permanent Change and Ethics, Integration and Looking Forward concludes the sessions with a hands-on, in-depth review and application of all of the coaching skills and principles acquired through the course. Participants will coach each other and participate in sessions that address specific coaching skills.

ClientWise is a full-service executive coaching and consulting firm focused exclusively on financial professionals, offering:

- **A coaching partnership that empowers financial professionals to develop a powerful path forward.**
- **An extensive resource library of tools to help financial professionals move down that path easily and efficiently.**
- **Co-ownership of the coaching partnership, where coaches and financial professionals work together to construct their own set of customized tools that work for their businesses.**

ClientWise was founded and is currently led by Ray Sclafani, a 25 year executive in the financial services industry. Since 2006, Ray has created a process-driven coaching firm designed to help financial advisors and leaders reach the next level of professional excellence with greater focus and ease. All ClientWise coaches are members of the International Coach Federation (ICF); most are certified at the Master Certified Coach (MCC) or Professional Certified Coach (PCC) level.

Aided by proprietary research and ClientWise's tools, such as The ClientWise Benchmark Assessment Report™ (BAR), our coaching and consulting services help financial advisors, professionals and leaders excel in the communication skills, the relationship management skills, client acquisition, marketing, team development, profitability, client and professional advocacy necessary to grow a financial services business and manage others in this rapidly-evolving industry.

Enroll today!
The Certified Financial Services Coach Training Program™

To enroll or learn more, please **contact ClientWise** at **800.732.0876**