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Chief Instructor/Consultant

FIFTY
ROCK
CONSULTING

DONORS NONPROFITS ADVISORS

Presentation:

"How to Successfully Work with Professional Advisors and Close More Gifts"

Speaking/Training 2017

Fifty Rock Consulting presents all across the country for conferences and clients. We hope you enjoyed today's session. Thank you for attending!

- February — St. Louis — Featured Presenter (2 topics)
- March — New York City — Breakout Session
- April — Waimea — Featured Presenter (2 topics)
- April — Boston — Breakout Session (2 topics)
- May — San Francisco — Breakout Session
- June — Los Angeles — Breakout Session (2 topics)
- June — Atlanta — Chief Instructor (4 hours)
- June — Phoenix — Keynote Presenter (2 topics)
- June — Prescott — Chief Instructor (6 hours)
- August — Denver — Keynote Presenter (2 topics)
- September — Boston — Chief Instructor (4 hours)
- September — Memphis — Breakout Session (2 topics)
- September — San Diego — Breakout Session
- September — Los Angeles — Chief Instructor (6 hours)
- December — Seattle — Featured Presenter

Who are the players?

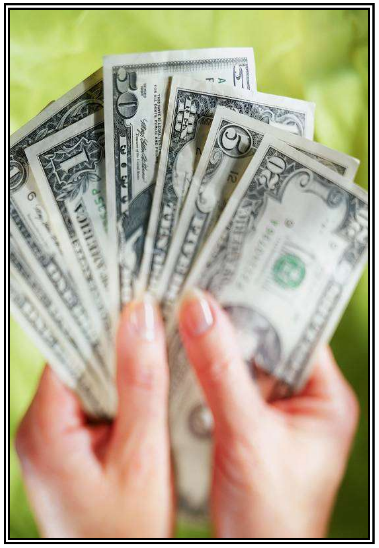
- Estate Planning Attorneys
- Life Insurance Agents (CLU)
- Certified Public Accountants (CPA) and Enrolled Agents (EA)
- Certified Financial Planners (CFP)
- Trust Officers, Investment Managers, Wealth Advisors, Brokers, Bankers, Realtors, Tax Consultants
- And the winner is …

Why Advisors are Important?

- Relationship and Trust
- Gatekeepers
- Expert, Authority, Influential
- Power and Approval
- Referrals and Credibility

Education & Training of PAs

1. Asset Protection & Conservation
2. Asset Growth & Accumulation
3. Maximize Transfer of Wealth
4. Maximize Control & Flexibility
5. Minimize Obstacles & Delays
6. Timing & Minimization of Taxes



How do PAs view you/your ideas?

- Client-Focused, Balanced Advocate, or Self-Interested, Fundraiser Machine?
- “One Size Fits All” or Well Tailored-Customized Proposals?

Reasons PAs “Just Say No”

- Reckless or poor financial, tax, or estate planning decision
- Client has not clearly expressed intent
- Goes against the very goals they are trained to achieve
- Does not understand the plan
- Feel loss of control and/or out of the loop
- They are not charitable themselves
- They will lose (or not gain) fees, commissions or future business

Winning Advisor Strategies

- Fight fire with fire: send in a “volunteer PA”
- Gunman for hire: retain your own PA

- Sharpest tool: increase your “advisor” skills and lingo
- If you can’t beat them: join them or “guest” them

- Work, work, work…bleh. Instead throw them a party!!!

- Be the “PG” resource: products, literature, illustrations

- Rising Tide: work together on a PG, any PG!
- Like $$$:

Sample Referral Language

Available upon request, the ABC Foundation provides this referral list to donors and friends as a convenience and courtesy.

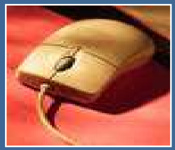
These attorneys are known to us as qualified and experienced in the area of estate and gift planning. It is the responsibility, however, of our donors and friends to interview and select the right attorney for their specific needs and situation.

Start Small but Build Big

- Start portfolio for advisors and keep them moving through the cycle.
- Identify Advisors
- Cultivate & Communicate to Advisors
- Involve & Engage Advisors
- Ask for Specific Help or Favors
- Steward “Repeat” Advisors

Be Prepared for a PA Visit

- Before visits, proposals, or marketing, review “Training - Goals - Reasons” sections, i.e. remember mindset of the advisor
- Know the “no’s” and “objections,” then be ready for them with your strategies, proposals, and solutions
- Practice, practice, practice!


THANK YOU!

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