The PED Persona: Thoughts On Your Success

Successful advisors can benefit from coaching, wouldn't you agree?

Along the path of your career, you've developed a personal style and approach that works well for you. That's no small task, and has certainly contributed to your success.

The Personalized Estate Design (PED) process has the power to transform your interactions with clients and enhance your method with a personal and intimate offering intended to highlight your value with the next generation of clients.

As you know from your own experience, it takes a relationship to craft a legacy. The PED process will help you deepen your existing relationships, and develop new ones. It opens doors to serve the next generations.

Here are a few sensible thoughts for you to consider...

1. We are taught to never open the door to a stranger.

It's up to you to be a friendly guide that can relate to a client's story. That's something a stranger cannot do. **Multi-Generational Wealth Counselors...**

Deepen the relationship—Commit to understanding the client's story. Your client will appreciate your effort, then extend their trust.

Show genuine interest—If you're not interested in what your client is saying, they won't be interested in sharing. Make sure your client feels heard.

Apply empathy—Move past the facts and imagine yourself within the client's story. Imagine it's your family.

Stay present—Set discovery meetings when you are able to be focused and not distracted. Don't let your schedule shorten a meaningful conversation.

Actively listen—Consider involving an assistant or recorder to supplement your note taking. This allows you the freedom to pursue important topics and stories that may arise.

Trust in the process—Don't waver, round edges, or cut corners. The results will come if you follow our intentional and thoughtful path.

2. We confide in people who listen without an agenda.

Within each chapter of the process are documents for your meetings. It's a good idea to follow the structure of the pages. Of course, things don't always go to plan. They may share less, or more, than you expected.

If they choose to share in-depth about a tangential topic, don't interject—there's no wrong answer when you're building rapport. If they've gone astray, don't worry, our process will get you back on track.

Ask questions. This process is built around your client's story. Ask the questions that help your client voice what's important to them. This develops a clarity, conviction, and ownership that will ultimately drive their personal plan.

Listen well. Analytic minds are wired to solve problems. When you hear something of value, write it down, but don't start strategizing yet. Problem solving comes later. Your follow-up questions are only as strong as your understanding.

Hold the solutions. With the PED process, we're empowering your client to discover how their personal story shapes their legacy – client comes first, your solutions come later.

3. We respond positively to thoughtful, handwritten letters.

When you are ready to start the PED process with a client, here's what you'll do: set the first meeting for a week out—ideally at the client's home. The next day, write a handwritten letter to your client and send it using a priority envelope. It's vital to the process and sets the tone for all that follows.

A handwritten letter says, "You're worth my time." It is more personal than a signature and seen as a greater investment than a call or email.

Along with the handwritten letter, we ask you invest five dollars, placing it in the envelope for your client's use to print out their favorite 4x6 photos. They will be asked to bring these photos, and their accompanying stories, to share at your first discovery meeting together.

Ready to begin? Feel free to use our template, or modify as your see fit. The sample letter can be found in your kit.

Next Steps

Multi-Generational Wealth Counseling requires a relational skill set. It's simple, yet complex. With this kit, we hope you feel empowered to lead your clients.

For additional support or resources, visit:
trusteeservicesgroup.com/support

ACCESS CODE: discoverPED

Stop calculating. Start discovering.

TrusteeServicesGroup.com/EstateDesign

© Trustee Services Group. 2019.