CLJ ADVISORY

COI GROUP TRAINING

CREATING A CULTURE OF COI RELATIONSHIPS WITHIN YOUR OFFICE TEAM

OVERVIEW

The *COI Group Training* is for managers of financial advisors to create a culture of referral-based relationships with CPAs, attorneys, and other COIs, among their teams. COI partnerships encourage true holistic planning and ultimately increase production within an organization.

WHAT YOUR ADVISORS WILL LEARN

- The importance of building a COI network
- The dynamics of the COI-advisor relationship
- How to identify and communicate their value to COIs
- The language and strategies to build professional trust
- An effective process to meet with more COIs
- How to build a COI network

HOW THE TRAINING IS IMPLEMENTED

ONLINE COURSE - 24/7 access to the 90-minute COI Referral Training online learning portal

LIVE SESSIONS - Up to six group training sessions that focus on preparing to meet a COI, developing an effective approach, and deepening the COI relationship

ADVISOR RESCOURCES - Access to online advisor community where ideas, stories, and experiences are shared

TOPICS COVERED

SECTION 1 - UNDERSTANDING THE REFERRAL RELATIONSHIP
SECTION 2 - ESTABLISHING A PARTNERSHIP
SECTION 3 - THE ADVISOR THAT GETS REFERRALS
SECTION 4 - HOW TO APPROACH A COI
SECTION 5 - FURTHERING THE RELATIONSHIP
SECTION 6 - REVIEW AND NEXT STEPS

For more details go to **cljadvisory.com**

"This course is important for students to begin understanding the business of financial planning. Despite anything they learn in the classroom, it is only through a disciplined business approach that they can grow their networks." - ***Martin Seay, PhD - 2020 FPA President & Department Head of Personal Financial Planning at Kansas State University***

"Got my first referral from an estate attorney!" The course trainings showed me how to deepen an existing relationship with an estate attorney. We always talked about referring clients, but I wasn't conveying the value I could bring to the table. The course helped me do just that and the result was the first in what should be a long line of quality introductions." - ***Michael Guthrie, Northwestern Mutual - Boston, MA***

"It is an excellent course." - ***Business Development Director, Morgan Stanley Graystone Consulting, - Norwell, MA***

"I liked your program. I have had success using your strategies... Keep up the great work!" - ***Vice President, Wells Fargo Advisors - New York, NY***

"Chris, you really hit the mark. Keep it going." - ***Leonard Lawrence, Apogee Financial Partners - Jacksonville, FL***

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WHAT ADVISORS ARE SAYING:

"The course is excellent! It is extremely valuable for new agents and established to help them grow their practices by mastering their language and systems in approaching COI's such as CPAs and Estate Planning Attorneys." - ***Roger Silvera, LUTCF, Million Dollar Roundtable Member, New York Life - Tampa, FL***

"The course reinvigorated our approach to establishing relationships with COI's. We always understood the importance of these referral resources but the course gave a fresh perspective on how to expand on these affiliations. I highly recommend this course for anyone that is dedicated to building their wealth management practice." - ***Vice President, CFP® - UBS Financial Services, New York, NY***

"I have always wanted to learn to communicate with CPAs and Attorneys-my 'chicken list.' This course gives insights that I have longed for on the topic of CPA and Attorney (partnerships). The quality of information is very high." - ***Gigi Wong, New York Life - New York, NY***

"The COI course was both enjoyable and valuable." - ***Managing Director, Wells Fargo Advisors - Wellesley, MA***

"It was great to hear the different perspectives of ways to improve the COI relationship. I don't get to have too many candid conversations with CPA's and Attorney's so this training provided excellent insight as to what they are thinking. It also gave me more strategic ways to grow these relationships. I think every agent can improve in this area and this course is so easy to take in and apply the lessons learned." - ***Henry Frazier III, New York Life - San Jose, CA***

"The course brought a level of nuance I haven't seen before on the topic of COIs. It is worth 10 years of instant client service/acquisition experience!" - ***James N. Whiddon, CFP, MSFS - Professor, Financial Planning Texas A&M University***

"This training walks you through the process in choosing and cultivating these partnerships. Our clients lives are complex and having specialized professionals that can provide the added security and peace of mind is reflected in this course." - ***Aurora Turner, National Life Group - Winston Salem, NC***

"The course certainly aligns with perhaps the single best strategy for attracting high net worth clients." - ***Managing Director, Wells Fargo Advisors - Boston, MA***

"Initially, the CLJ process helped me build my Sales Central database. I started using it again and I've already been able to restore three COI relationships with a fee-for-service advisor who instantly referred 3 clients to me." - ***Stephan Taylor, New York Life - Pasadena, CA***

"My main takeaways were the Value Proposition and (understanding) the COIs perspective. Good course." - ***Amy Berk, MBA, CRPC®, CLTC®, Ameriprise - Denver, CO***

"The training was phenomenal! It helped me realize what I wasn't doing to capture this market." - ***Tamara Haskins, CPA, MS, New York Life, - Bethesda, MD***

"Great course!" - ***Marc-Alexandre Barbe, Planisource Inc. - Montreal, QC***

"Just want to thank CLJ University for the awesome course! It helped me set a team-oriented atmosphere between my clients and their tax and legal professionals." - ***Jonathan Brown - Independent Financial Partners - San Jose, CA***

"Thank you for that insightful meeting. Your knowledge is invaluable!" - ***Francisco Borrego, New York Life - Tampa, FL***