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 and get consistent referrals

WHAT YOUR ADVISORS GET

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

LIVE TRAINING SESSIONS - Up to five group training sessions that get your advisors building COI parnerships

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

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"This program has been so beneficial for me!" - ***Spencer Luecke, LPL - La Salle, IL***

*"Chris- another great session- I am determined to make this work. You are a strong motivator and I hang on every thought and idea you pass out. My mindset has completely changed to find a way to serve my client well with a COI." -****Dave, Senior Vice President, Wells Fargo Advisors - Portsmouth, NH***

"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***

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

IMPLEMENTATION

1. ONLINE COURSE

Advisors get an exclusive access code to enroll in the 90-minute *COI Referral Training* course and complete the online content. This is a foundation to the live sessions.

2. LIVE TRAINING SESSIONS*

WEEK 1 - UNDERSTANDING THE REFERRAL RELATIONSHIP

In week 1, advisors gain a deeper understanding of the benefits, barriers, and the dynamics of developing COI partnerships. (*Activity: Develop your Value Proposition)*

WEEK 2 - ESTABLISHING A PARTNERSHIP

In week 2, advisors learn: (1) How to identify the right COI, (2) The types of COI partnerships and (3) How to begin the process to develop a large network of COIs.
(*Activity: Develop script to prepare your clients)*

WEEK 3 - DEVELOPING YOUR PROCESS

In week 3, advisors learn the next step of the process on how to set up a COI meeting.
(Activity: Setup COI meeting)

WEEK 4 - FURTHERING THE RELATIONSHIP

In week 4, advisors learn how to develop professional trust and develop relationships with COIs they know.
(Activity: Asking effective questions in a meeting with a COI)

WEEK 5 - REVIEW AND NEXT STEPS

In this final session we quickly review the training and reinforce the process to create their COI network.
(*Activity: Fast-paced role play)*

**Each session is approximately 1 hour in duration*

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

"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." - ***Senior Vice President, CFP® - UBS Financial Services, New York, NY***

"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***