



**Workshop
PROGRAM
includes:**

Enrich Australia Pty Ltd training program 2008

The Potent Adviser™

... professional
development
beyond the technical

Know Your Client, Know Yourself

... and the contexts and motivations for refined interpersonal skills in business of advice

Introduction to Personal Values

... and their relevance & importance to you and your clients

Essence of The Potent Adviser™

... and your own story – the lifeblood of your authenticity

Turning your Potential into Potent

... and using the Enrich Australia support tools

Skills for Transforming Your Advice

... and identifying your style in client relations

Other Roles for Client Values

... introducing philanthropy to clients

The Challenge of Ethics & Conflict

... creating a framework for dealing with ethical dilemma

Next steps, coaching & support

Program © Enrich Australia 2008; subject to change; CPD points allocated will depend on final content; this training is not in any form advice and should not be relied upon as such and appropriate independent advice should be sought before any action is taken or refrained from being taken in its regard.

- refine **interpersonal skills** to transform your advice
- work productively with **personal values** across your business
- have frameworks for dealing with **ethical issues** and introducing **philanthropy** to clients
- understand how to work with **new generations** of clients
- get **CPD** points in essential areas of generic skills & ethics

THE POTENT ADVISER training program develops advisers' capacity for building closer relationships with clients.

The INTERACTIVE WORKSHOP format delivers proficiency in key 'soft-skill' or interpersonal areas via a highly individualised training process designed to develop the relevance and use of such skills in their business.

The program introduces effective, intuitive ways for working with client values, enables advisers to expertly introduce and deliver strategies for client philanthropy, and helps them come to terms with new generations of clients.

Also addressed in the training are essential areas of dealing ethical issues and conflict in professional and personal contexts.

WHY REFINE YOUR INTERPERSONAL SKILLS?

Effective and natural interpersonal skills deliver a service in wealth planning that's memorable and appealing – beyond one that singularly addresses a client's desired financial outcomes.

If you relate to your clients in ways that naturally build and bind close relationships, the benefits will become obvious as deeper levels of trust and sustained loyalty emerge.

Having a process by which you can relate to anyone, including generations or people from backgrounds other than your own is also essential for your profession. This training helps you come to terms with all these important areas.

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