
Accelerating Trust Development

Five tenets for quickly and effectively building trust
with high-value leads

TRUST IS EVERYTHING

As an independent financial advisor, you're an expert in maximizing returns on investment for your clients. We at FMT Solutions want to help you maximize your return on your most important resource - your time.

We believe that building trust with high-value leads is the most important output your time dedicated to client acquisition can deliver. And joining FMT's Financial Educators Network provides your firm with the tools and environment to accelerate trust development in your client pipeline.

BUILD TRUSTED ADVISOR RELATIONSHIPS

Building trusted advisor relationships pays off in myriad ways. Trust helps fill your appointment calendar with highly-qualified prospects, shortens time to convert leads, opens communications to help you be a more effective advisor, and continues to pay dividends over the lifetime of a client relationship through increased business and referrals.

Recent research by Vanguard* shows that the outcomes most people are looking for from financial advisors are *emotional*. They want to feel listened-to, understood, and taken care of. These outcomes are the core of a trusted advisor relationship, and working to establish these relationships will pay off more for your business in the long run than any number of dinner seminars or digital listings ever could.

FMT has decades of experience placing advisors in ideal environments for building trust with qualified leads. As a member of the Financial Educators Network, your firm will have access to the resources needed to accelerate trust-building with audiences hungry for knowledge and clarity.

Our platform focuses on five tenets of establishing relationships and developing trust with high-value prospects: true education, specialization, communication, location, and amplification. Over the following pages, we'll explore roadblocks to relationship development and how the Financial Educators Network platform features these five tenets to accelerate your path to trusted advisor.

THE PROBLEM

Trust is the core of most important relationships in life, and that's especially true with a subject as personal as financial management. Subjects like retirement, estate planning, and business succession planning can be emotionally stressful, and people are naturally slow to trust in such matters. Why?

THE PROBLEM

LACK OF KNOWLEDGE

Families don't have the information or aren't prepared to make long-term financial decisions, or even really know where to go for help. People who are investing on their own have low confidence in their choices.

INFORMATION OVERLOAD

Google any key term in financial planning and see a flood of results, with little context to judge quality or accuracy of results. There's a ton of information out there, but few good ways to filter in a useful fashion.

MARKETING MIS-FITS

Traditional marketing techniques can feel salesy and inauthentic. People want to be able to feel out their potential advisors and connect as people, but often aren't presented with the opportunity.

RELATIONSHIPS TAKE TIME

First impressions matter, but real trust is developed through repeated interaction. Opportunities to demonstrate expertise, empathy, and follow-through are paramount in building trusted relationships.

THE SOLUTION: EDUCATION

When information is abundant, education becomes paramount.

Education is the name of the game when you join the Financial Educators Network, and the primary element in accelerating trust with potential clients. When large volumes of complex information are readily available, people become skeptical about what is true, how much they understand, and who to trust. Educating - *truly* educating - your prospects is the best start down the path to becoming a trusted advisor.

Education allows you to demonstrate your expertise, engage in thoughtful conversations, and tailor the shared time to the needs of your students. It's the optimal way to establish trust both as a subject matter expert and as a person who understands the needs and concerns of others.

FIVE TENETS TO ACCELERATE TRUST DEVELOPMENT

-
- 1 TRUE EDUCATION**
 - 2 SPECIALIZATION**
 - 3 AUTHENTICITY**
 - 4 ENVIRONMENT**
 - 5 AMPLIFICATION**



TRUE EDUCATION

Important aspects of this tenet to accelerate trust development include:

Exploring topics in-depth

Education isn't about sound bites, your class can feel the difference when you're authentically engaged and taking the time and effort to dig into important concepts.

Sharing context and background — and make it personal. Engage with prospects about who you are, what you do, and why you do it.

Providing Knowledge FAMILIES NEED

to make informed decisions when working with an advisor—whether it's you or not.

Finding teaching moments

where you can help class members understand how to identify trusted, accurate sources of information—enable them to continue their education independently.

Thoughtfully answering questions

that arise in a timely manner, and not making up answers. Following up with an answer you had to research is a great opportunity to engender trust with a prospect.

Remembering this is a class, not a pitch

You're not booked in a banquet room delivering free steaks to a half-interested group of locals. You're teaching valuable skills and information to a qualified, motivated audience that's preparing to make big life decisions and has paid to attend a class - use the opportunity to demonstrate your value.



SPECIALIZATION

Important aspects of this tenet to accelerate trust development include:

Not trying to be everything to everyone - Its impossible

Align your class audiences and content with your areas of expertise and your firm's ideal client profile.

Demonstrate deep expertise on a key topic

This will develop trust more effectively than shallow expertise on many topics.

Taking notice of trends and patterns in the audiences you teach.

You'll often be able to use one family's situation to help another family, and it's heartening for prospects to know that you've achieved positive results in similar situations.

Pay attention

to education and communication preferences in your classes can help direct your firm's allocation of client development resources.



AUTHENTICITY

Important aspects of this tenet to accelerate trust development include:

Delivering education in a manner that is genuine

not sales-y. Your students are humans with wants, needs, and fears. Be a human back!

Speaking to the why

tie the information to their goals moving forward in life. Focus in the classroom should be on strategies and approach over specific products or tactics.

Adapting to your audience's preferred learning and communications styles

Sometimes slides need to be set aside for a group discussion, a high-impact video, or a spirited Q&A.

Aligning with your prospects' values, life stage, and lifestyle.

Make sure you're providing the right content to the right people.



ENVIRONMENT

Important aspects of this tenet to accelerate trust development include:

Hosting classes in an appropriate, education-first venue

such as a local university or community college. Educational institutions lend credibility as well as provide a suitable learning environment.

Ensuring access to your class sessions

Successful Financial Educators Network members often hold multiple courses in multiple locations throughout their market during a given term, so that anyone that may want to attend is able.

Demonstrating that you're connected to your community.

Help prospects understand that you're members of the same community, and you want to help them invest in a future that exists here. And even if they buy a vacation house across the country, you're not going anywhere.



AMPLIFICATION

Important aspects of this tenet to accelerate trust development include:

Reinforcing class concepts with supporting texts and exercises

opportunities for multi-modal learning lead to greater retention of information and understanding of how to use new knowledge.

Deliver Content

that reflects the latest developments in policy and practice. Adapting to your audience's preferred learning and communications styles. Sometimes slides need to be set aside for a group discussion, a high-impact video, or a spirited Q&A.

Emphasizing that education is an ongoing process

There is tremendous value to gain from attending a couple of class sessions, but the classes are only the starting point.

Pairing your classes with supplemental learning

sharing additional educational materials with prospects at follow-up meetings or digitally.

BRINGING IT ALL TOGETHER: THE FINANCIAL EDUCATORS NETWORK

Committing to client development through true education is not easy, and it's not for everyone. But for the right advisors, FMT's Financial Educators Network can provide the ideal environment for accelerating trust development with high-value prospects. For those who embrace the challenge of teaching, the rewards can be outstanding. How does Financial Educators Network membership help facilitate each of our five tenets?



Tenet One: Education

When you join the Financial Educators Network, FMT uses decades of experience combined with emerging data modeling technology to identify and enroll the highest-potential families in your market area. You will have a classroom of engaged, interested prospects eager to learn and looking to you for your expertise. Your students stand ready to make major decisions about their financial futures and your expert guidance can supercharge trust development.



Tenet Two: Specialization

Flexible curricula and an expanding content library allow you to tailor courses to your specialties and the needs of your students. Add supplemental materials, bring in guest speakers, or design class activities to showcase areas of expertise - the six hours of classroom time in a standard course provides you the ability to make it your own.

BRINGING IT ALL TOGETHER: THE FINANCIAL EDUCATORS NETWORK



Tenet Three: Authenticity

The right information at the right time is key to accelerating trust, and we know that one size does not fit all. With course content tailored to specific life stages and a goals-first approach, you have a basis for starting real conversations to be continued in follow-up meetings and beyond.



Tenet Four: Environment

Whether it's helping you find the right location or continuing to build on existing venue relationships, Financial Educators Network staff will help you create the right class schedule for your market. And with access to a network of hundreds of financial educators, you can learn from the best to create and refine your ideal teaching environment.



Tenet Five: Amplification

FMT's annual product updates mean you always have access to the most current policy information in FINRA-reviewed course materials and workbooks. Knowledge sharing from our standout educators provides starting points for course supplements and ongoing education materials. And our compliance relations functions mean you'll always be in good graces with the lawyers when we're marketing your courses.

Ready to Learn More?

By accelerating trust development through delivering true education to the right audience, in the right place, at the right time, you'll maximize the time you allocate to client acquisition. Teaching is a calling for some, and a chore for others, but those who put in the work to be quality educators are rewarded with unbeatable lead conversion rates, longer-term and more profitable client engagements, and years of positive word-of-mouth. And who knows? You might make a friend or two.

If you're ready to explore client acquisition through education, FMT is here to help. Membership in the Financial Educators Network provides access to our entire educational marketing platform, giving you access to the most effective client acquisition solution available. Call or email us today to learn more about membership.

CONTACT US

Let's start growing better, together



877-575-4205



admissions@fmtsolutions.com



POWERED BY

FMT
SOLUTIONS™