2016 MDRT Annual Meeting e-Handout Material

Title: Highly Effective Wealth Planning Model for Sales Growth

Speaker: Bernard Lim, CFP, CSFE

Presentation Date: Tuesday, June 14, 2016

Presentation Time: 10:00 - 11:00 a.m.

Million Dollar Round Table
325 West Touhy Ave.
Park Ridge, IL 60068 USA

Slide 1

Slide 2

Slide 3

Slide 4

WHY CLIENTS ARE LOOKING FOR MORE…

SUMMARY OF EY 'GLOBAL INSURANCE SURVEY" (2014)*

- *TRUST (or lack of it) is a serious issue*
- *LOYALTY does not mean the customers will stick with you*
- *INTERACTIONS have to be frequent and purposeful*
- *BESPOKE is the new buzz word*

** The findings have been paraphrased in this slide. Refer to ey.com for complete report.*

Slide 5

WHY CLIENTS ARE LOOKING FOR MORE…

SUMMARY OF BAIN & CO "PRIVATE WEALTH REPORT (2015)*

- *COMPETENCE*
- *BRAND*
- *PERSONAL RELATIONSHIP*

** The findings have been paraphrased in this slide. Refer to bain.com for complete report.*

Slide 6

WHY CLIENTS ARE LOOKING FOR MORE…

A COMPETENT TRUSTED ADVISOR WHO

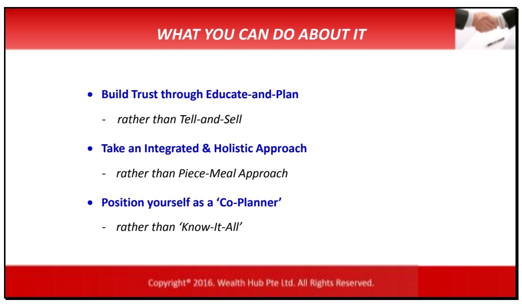
INTERACTS FREQUENTLY &

UNDERSTANDS THE CLIENT'S UNIQUE NEEDS AND

PROVIDES HOLISTIC & INTEGRATED SOLUTIONS

Slide 7

Slide 8



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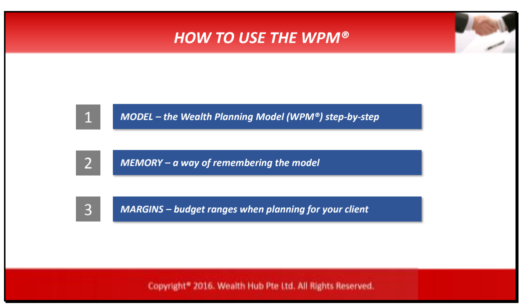

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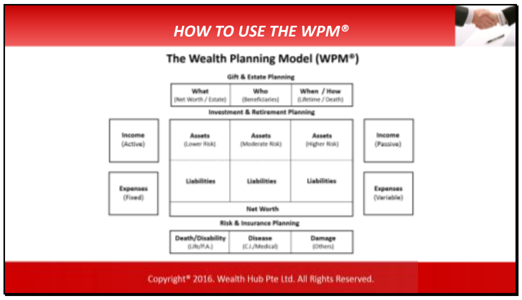

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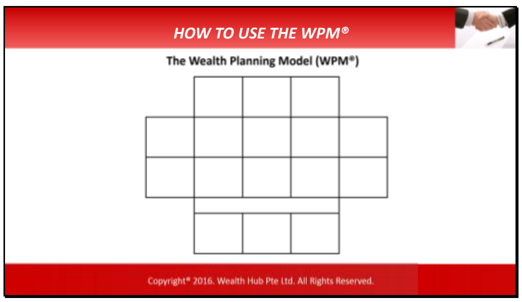

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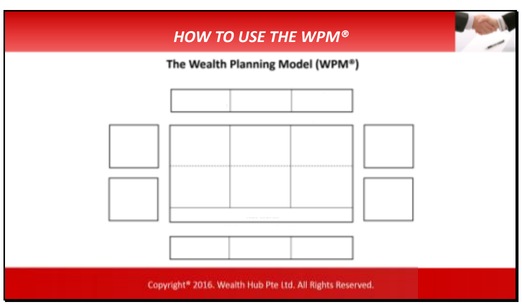

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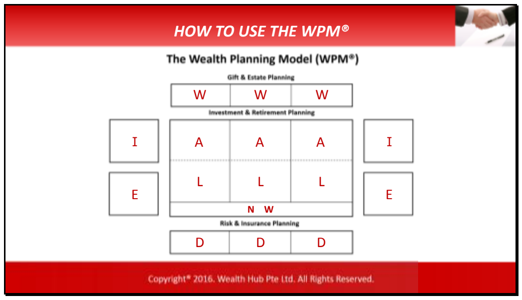

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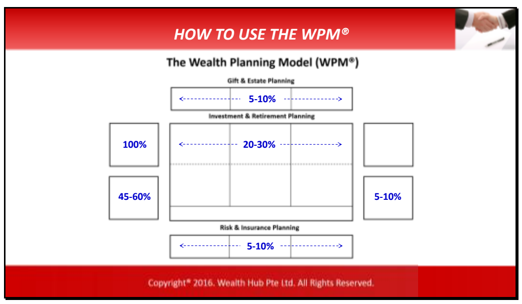

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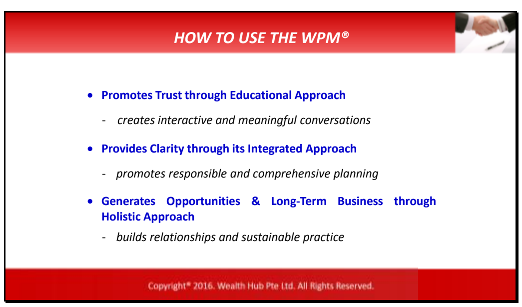

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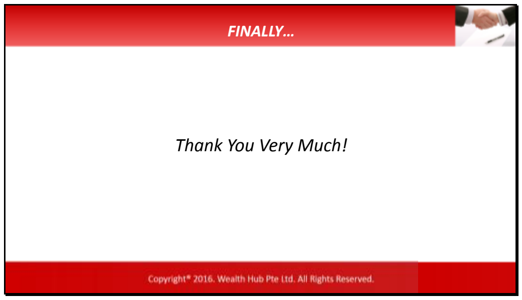
FINALLY…
Thank You Very Much!
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