



## **2016 MDRT Annual Meeting e-Handout Material**

**Title:** Illustrated Advice: Show Your Clients What Good Advice Looks Like

**Speaker:** Paul Mollica, CFP

**Presentation Date:** Tuesday, June 14, 2016

**Presentation Time:** 3:30 - 5:00 p.m.

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

Slide 1



**Paul Mollica, CFP**  
*Illustrated Advice: Show Your Clients What  
Good Advice Looks Like*

MDRT  
2016  
JUNE 12-15  
Vancouver

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Slide 2

**The Wealthkey Way**



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Slide 3

**Agenda**

**Introduction**

- Client engagement
- Illustrations and toolkit
- Positioning and time management
- Questions

**Big DISCLAIMER** – This is my model of the world. All of these ideas are modular, transferable and have been tested for compliance within my practice and dealer group. You will need to make your own enquiries if adopting this approach.

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Slide 4

## 1) Client Engagement

- Starting with the right question.
- Using the agenda format.*
- Additional questioning tools.*
- Discovery workbook and client experience.
- Sharing some ideas.*
- Visual progress to an outcome.
- "Where am I in the process?"*



Slide 5

**The  
best  
APP  
on  
earth!**

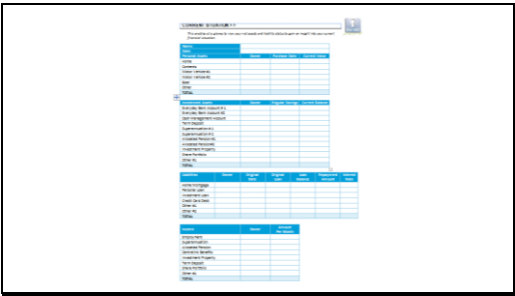
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Slide 6

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Client  
Discovery  
Workbook  
2016

Slide 7



Category	Item	Value
Assets	Current Cash	\$1,000,000
Assets	Investment Accounts	\$500,000
Assets	Real Estate	\$2,000,000
Assets	Other Assets	\$100,000
Liabilities	Current Debt	\$500,000
Liabilities	Long-Term Debt	\$1,000,000
Liabilities	Other Liabilities	\$100,000
Net Worth	Total Net Worth	\$1,500,000

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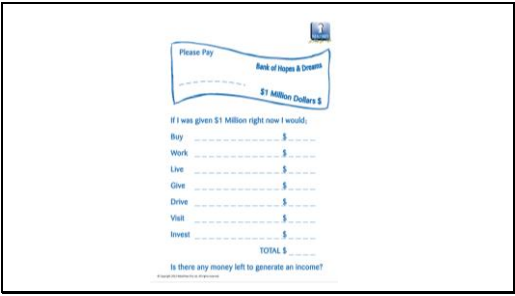
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Slide 9



Please Pay

Bank of Expenses & Income

\$1 Million Dollars \$

If I was given \$1 Million right now I would:

Buy ..... \$ .....

Work ..... \$ .....

Live ..... \$ .....

Give ..... \$ .....

Drive ..... \$ .....

Visit ..... \$ .....

Invest ..... \$ .....

TOTAL \$ .....

Is there any money left to generate an income?

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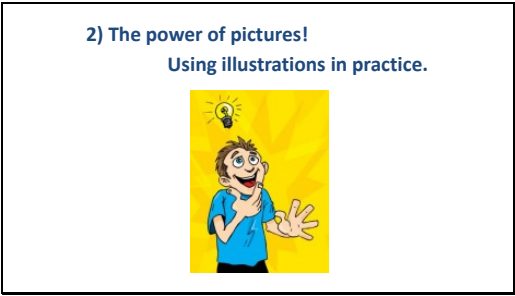
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Slide 11



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Slide 12



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Slide 13



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Slide 14



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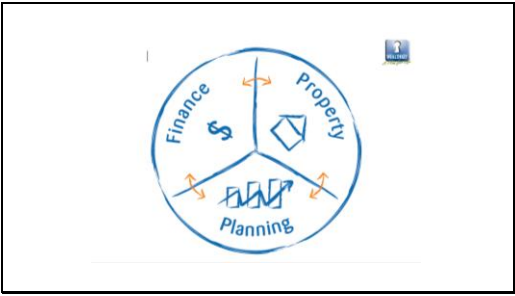
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Slide 15



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Slide 16

**Positioning**  
with a story that makes sense and connects.



This person speaks my language.  
I understand.  
I will remember the story and the pictures long after I have forgotten the numbers.  
This is new to me but I get what you stand for and I tend to agree with you...

Listen to the clients language for clues!

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**Client Tool Kit**  
2016



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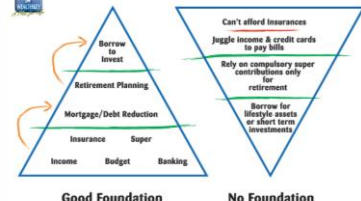

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**Good Foundation**

- Borrow to Invest
- Retirement Planning
- Mortgage/Debt Reduction
- Insurance
- Income
- Budget
- Banking

**No Foundation**

- Can't afford Insurance
- Juggle Income & credit cards to pay bills
- Rely on compulsory super contributions only for retirement
- Borrow for lifestyle wants or short term investments

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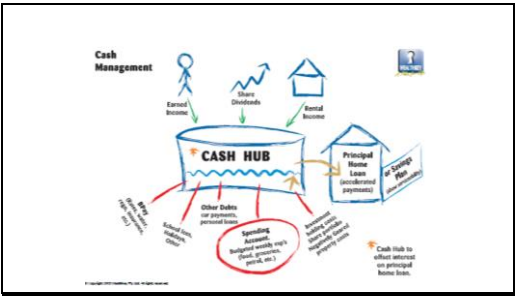
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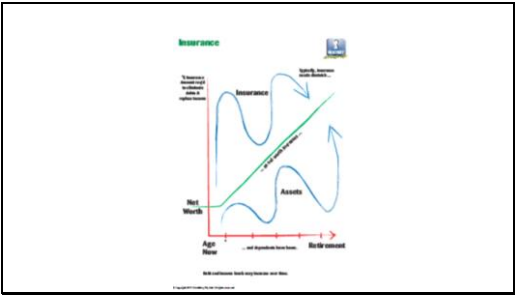
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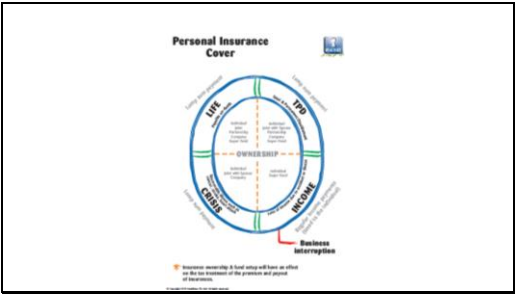
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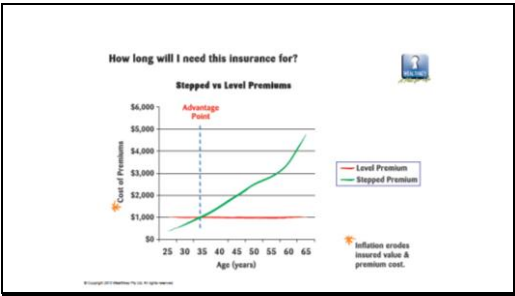
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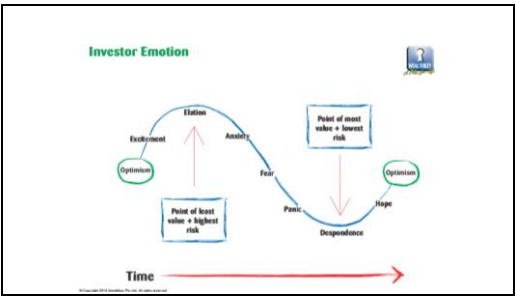
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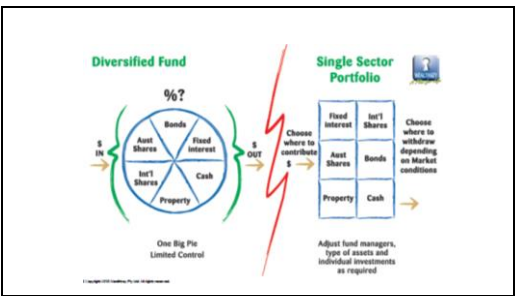
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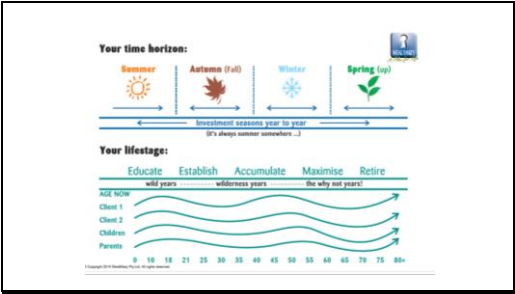
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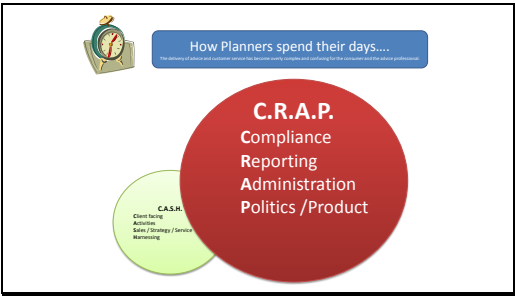
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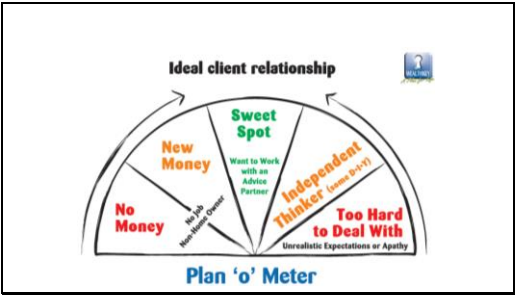
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Slide 30

**Thank You**



- Additional services:
- Books, Workshops, Professional Development Days.
- Questions.

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