



## It's time to become a **TRUSTED ADVISOR OF CHOICE**

**So you think your team has mastered relationship-based advising? Think again.**

In today's financial services environment, professionals face ever-increasing competition. Clients expect competitive returns, low fees, and are now demanding to work with advisors who truly understand their unique situation and needs throughout their entire financial journey.

**Dr. Amy's Trusted Advisor of Choice** is a game-changer for your business. Give your Advisors the benefit of forging deeper, more authentic relationships that will keep your brand top-of-mind. This unique program will help your organization to:



### **What's so different about Trusted Advisor of Choice?**

Packed full of insights, this practice elevation program gives advisors an edge – the human edge. Dr. Amy shares her expertise in connecting clients' non-financial issues to their financial planning. Her proven methods and tools help take clients' trust to an exciting new level.

*“This program has given me a renewed excitement about my role as an advisor and the value I can bring.”*

### **Self-paced, comprehensive, virtual learning**

The program is presented in 9 topics with video instruction by Dr. Amy. Advisors can access whenever most convenient, including:

- 29 bite-sized lessons
- Live coaching sessions
- Conversation guides
- Embedding exercises
- Real-world case studies
- Client engagement tools

### **Why Dr. Amy?**

Dr. Amy D'Aprix is an internationally respected expert on life transitions and relational insights. Holding a Ph.D. in social work, she has consulted for the financial industry and trained advisors for over a decade. Thousands of people have benefited from her guidance through speaking engagements, educational programs, and coaching that deliver ROI.



Having **Trusted Advisors of Choice** will help you accelerate client loyalty and referrals!