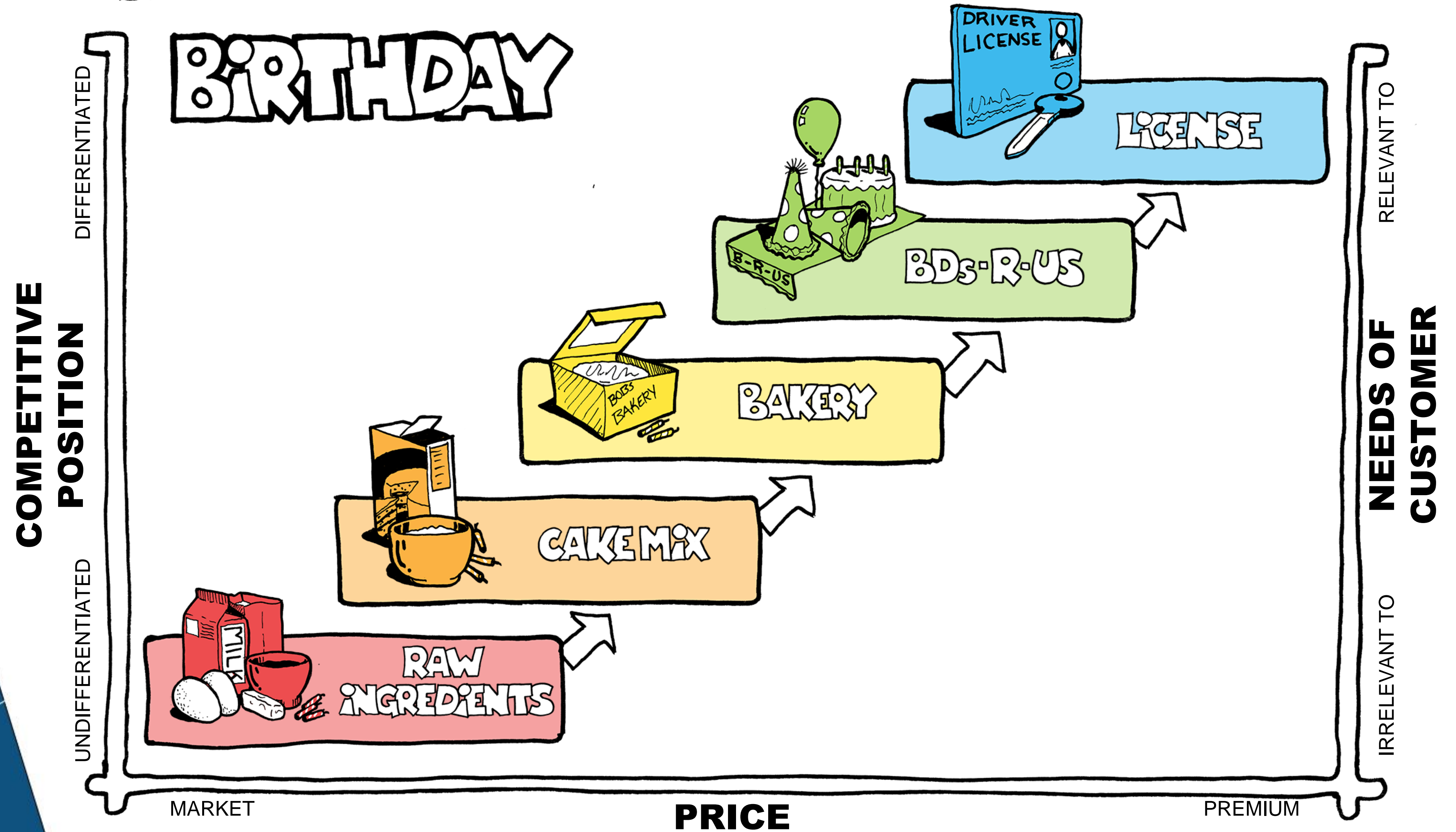


Serious Shift: Shifting From Advisor To Advocate

Dennis Moseley-Williams
dmw@moseleywilliams.com



PROGRESSION OF ECONOMIC VALUE

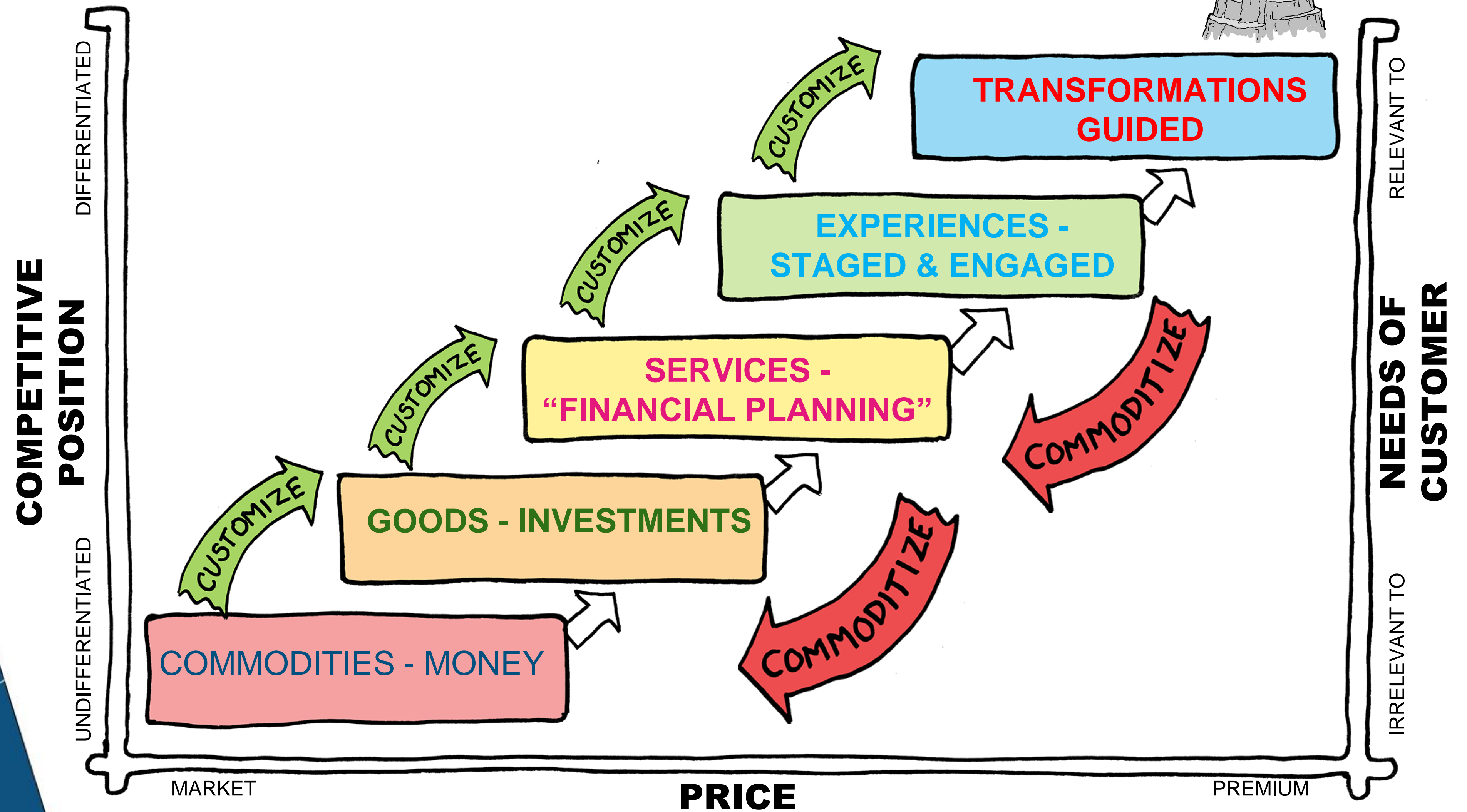


SERIOUS SHIFT - 1

KNOW WHAT BUSINESS YOU'RE IN



PROGRESSION OF ECONOMIC VALUE





Raising the Bar: The financial Services
Client Experience July 2021




Raising the Bar: The financial Services
Client Experience July 2021



McKinsey
& Company

On the cusp of change: North American wealth management in 2030




“In the next 10 years, advisors will gradually shed their role as investment managers and become more like ‘integrated life/wealth coaches.’”



SERIOUS SHIFT – 2

CREATE TIME WELL INVESTED



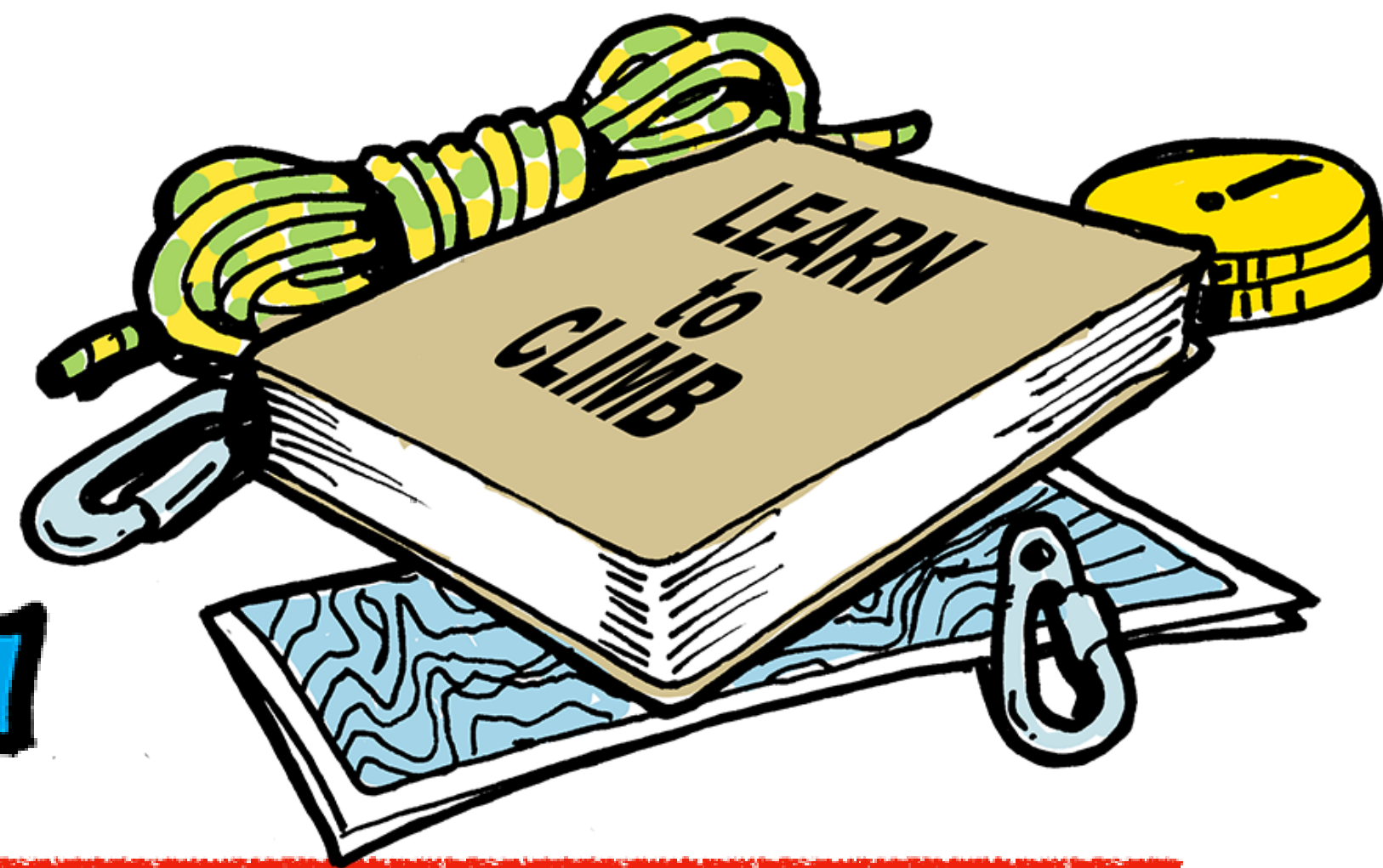
“Time invested with you should be emotional, meaningful, memorable, deeply personal and transformational.”

ENTERTAINMENT

EDUCATIONAL

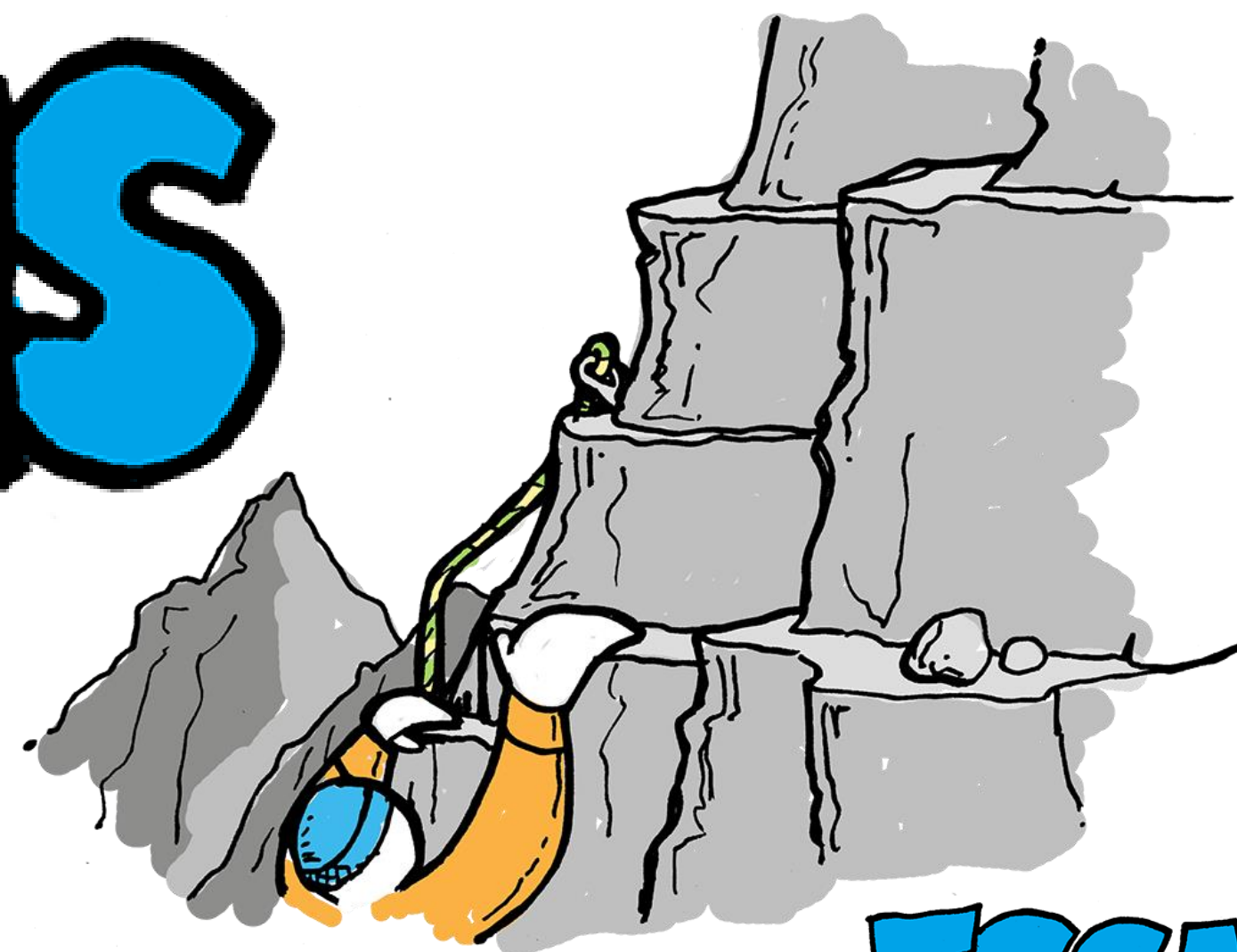
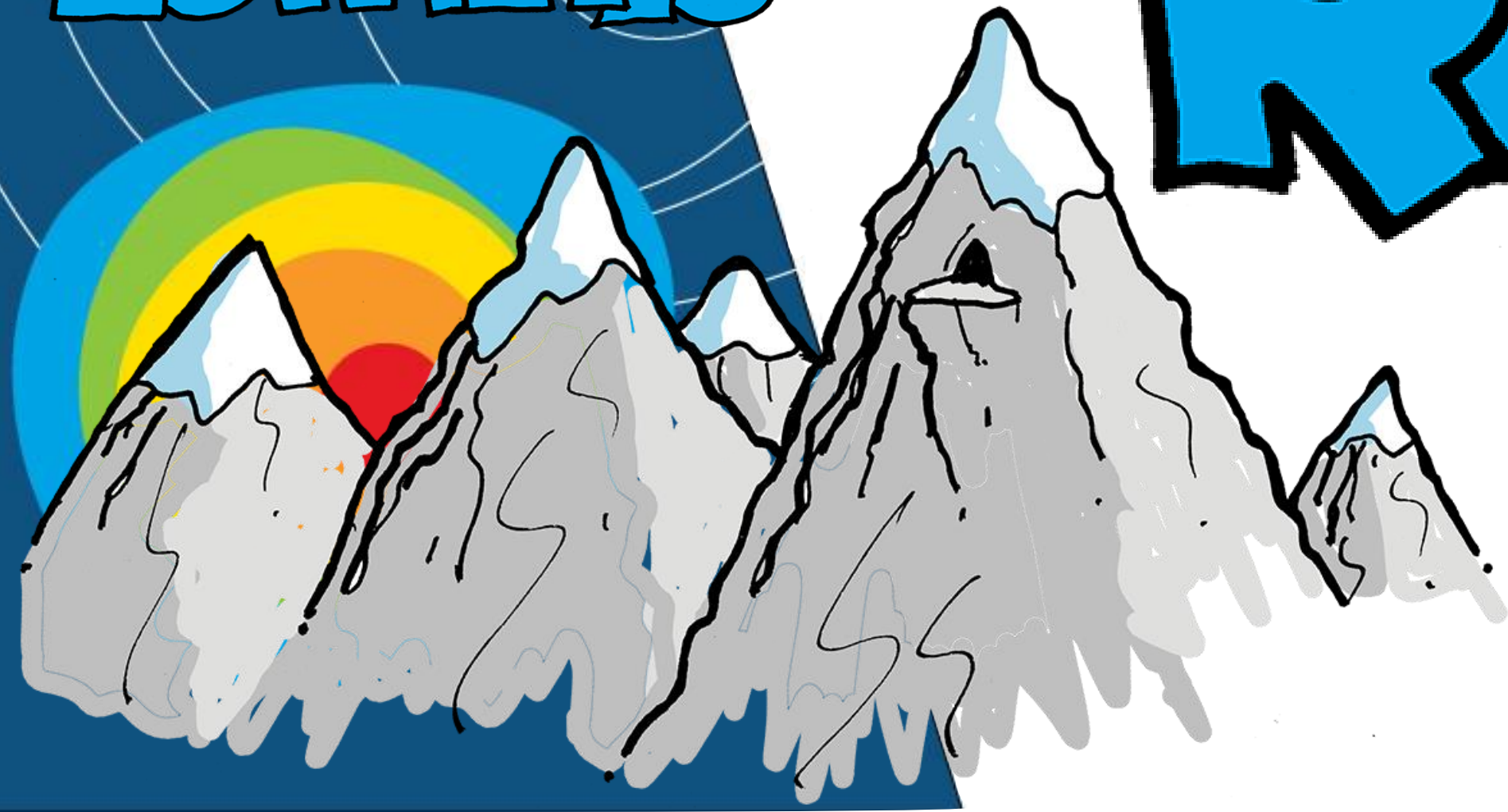


THE 4



ESTHETIC

REALMS

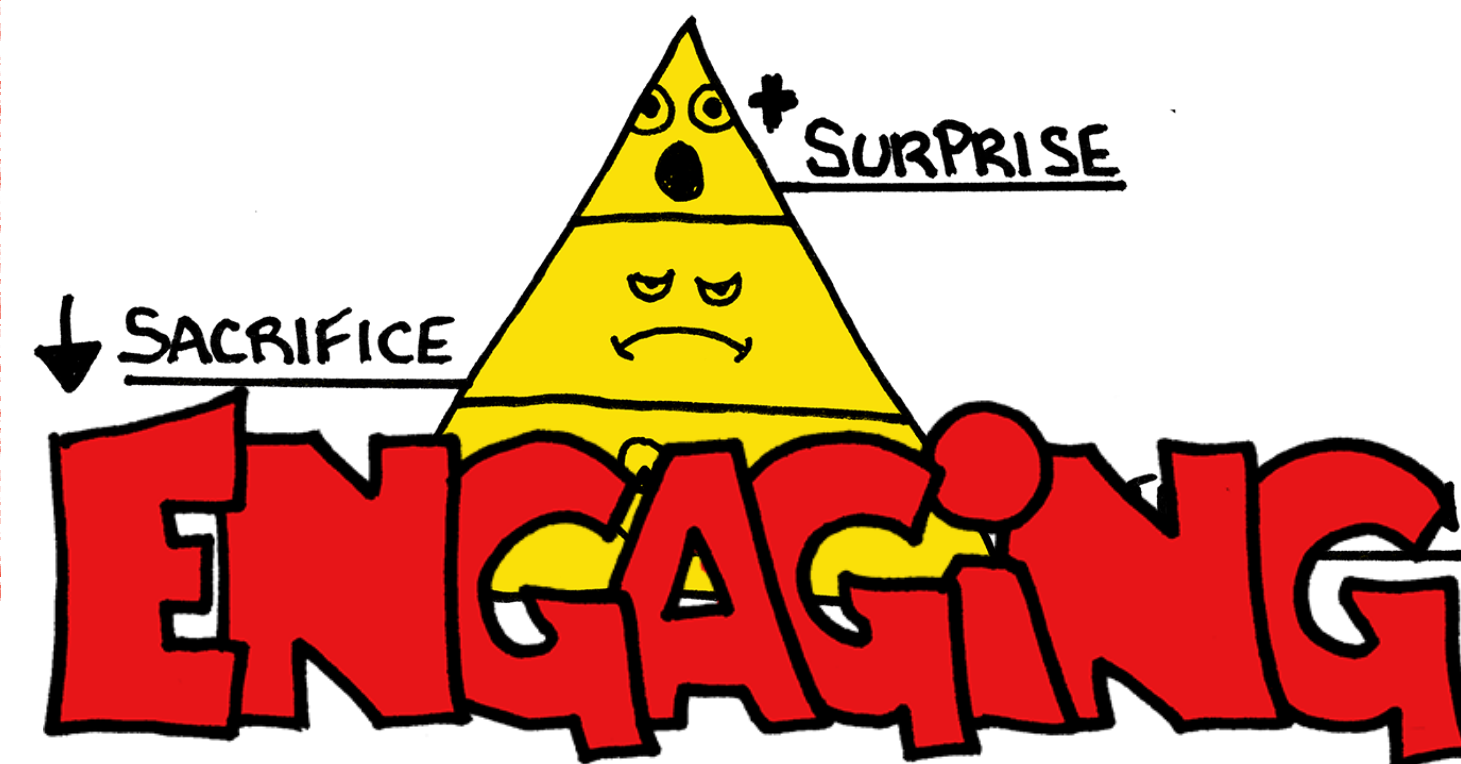
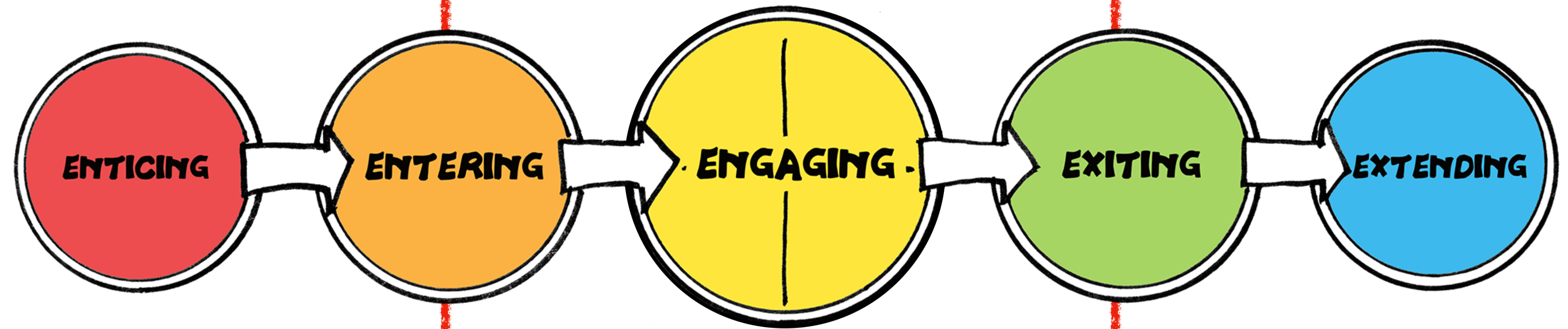


ESCAPIST

BEFORE

DURING

LATER



SURPRISE – A GIFT



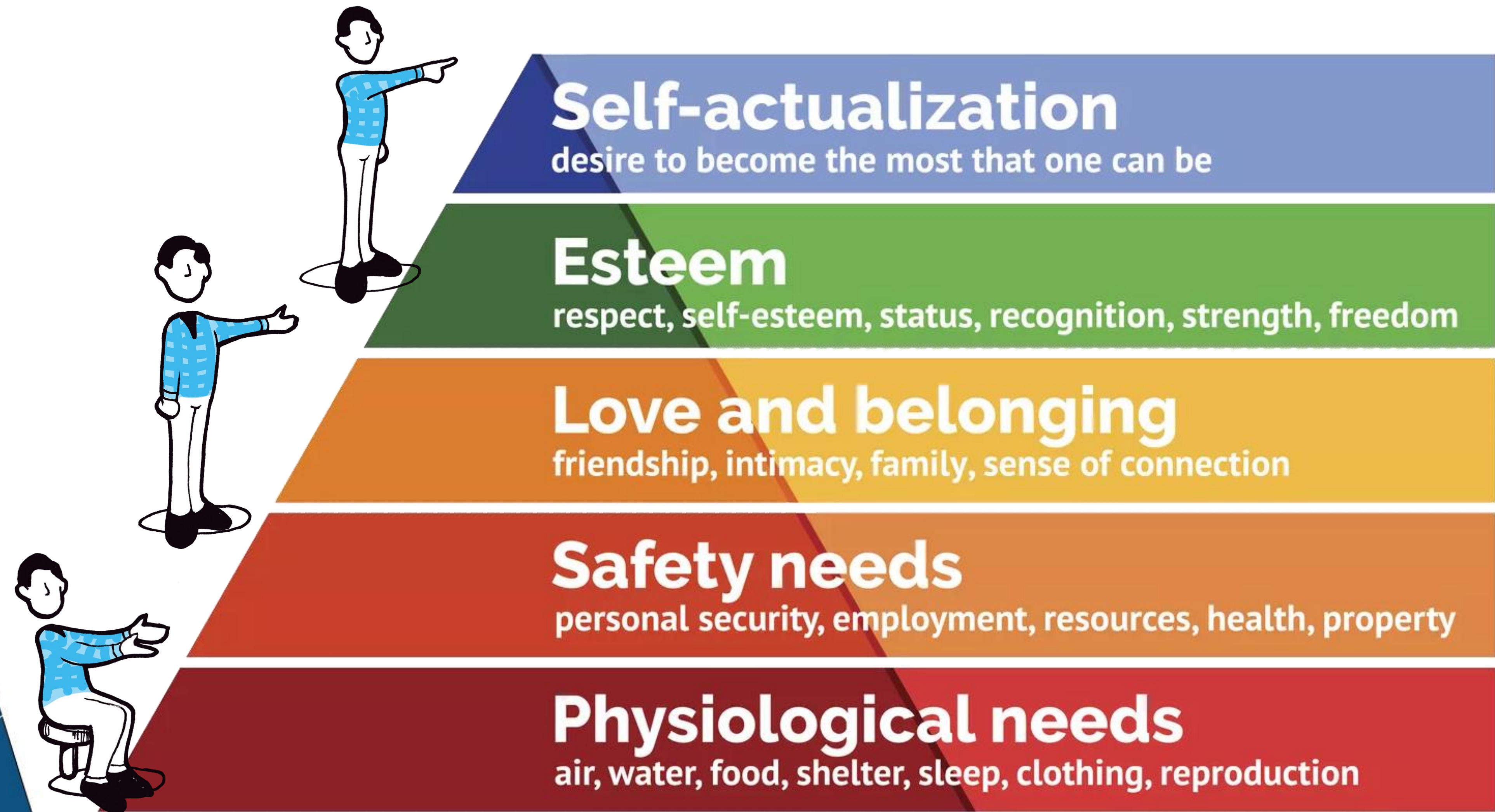
SERIOUS SHIFT – 3
CREATE SOMETHING
UNEXPECTED



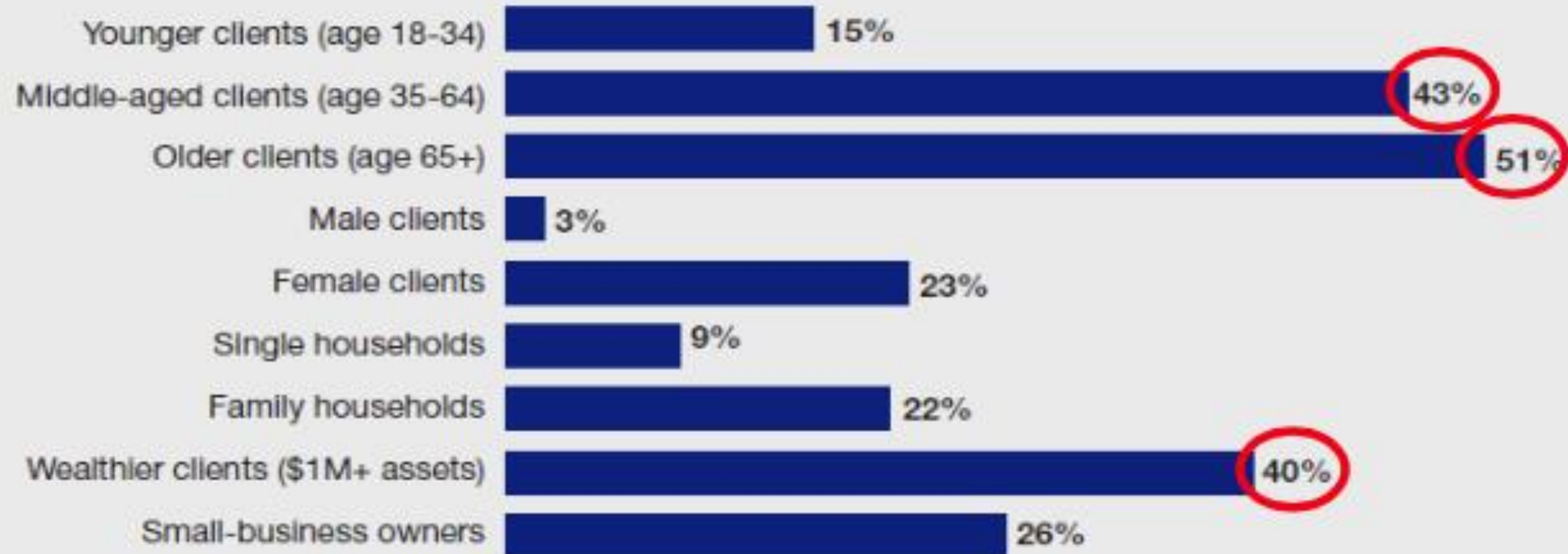
Assigned vs. Required Work



MASLOW'S HIERARCHY OF NEEDS



Which client segments are most likely to demand broader services beyond financial advice?
(Select up to three)



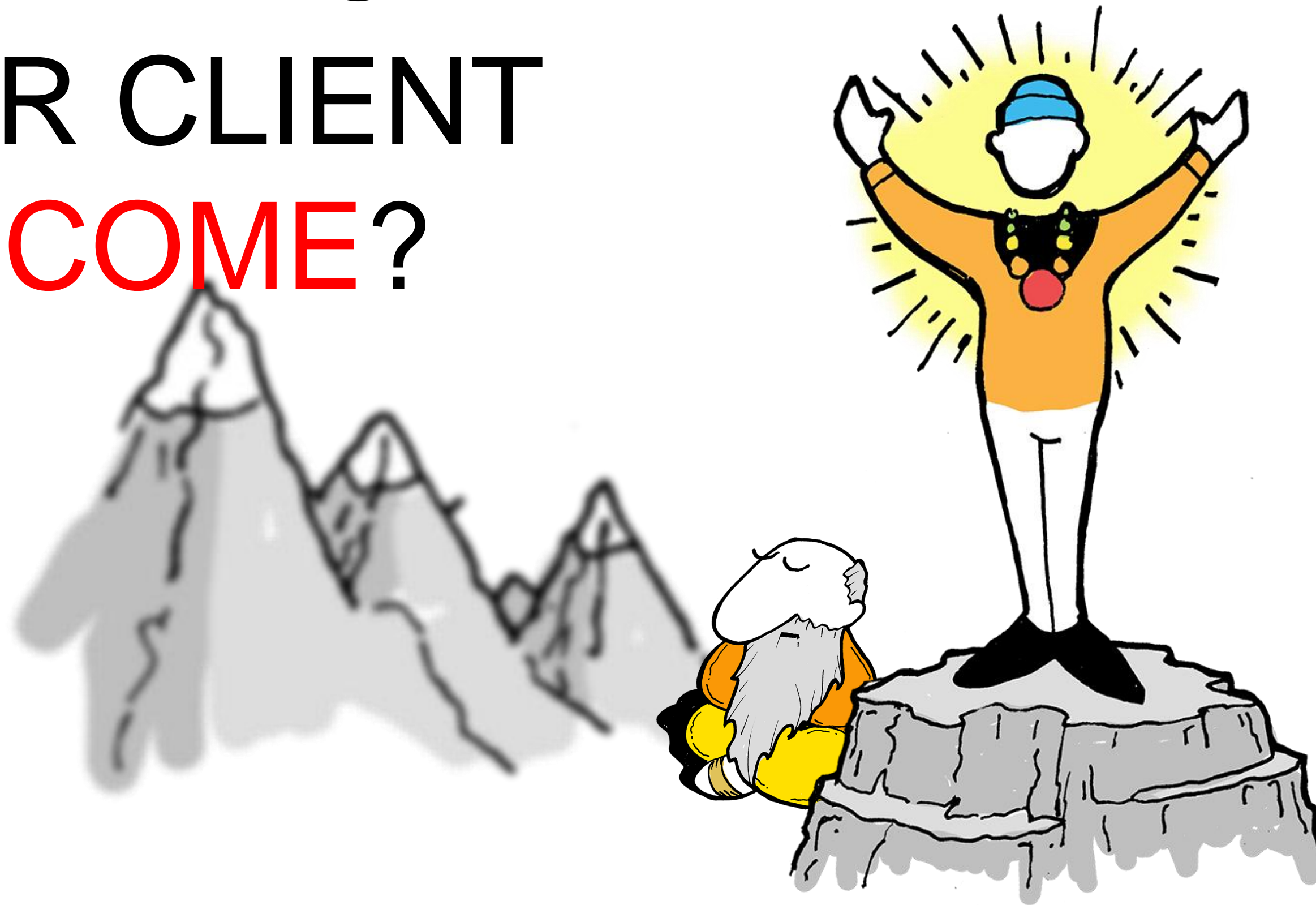
Beyond Finances: Holistic Life Planning Trends Among
Advisors, Equitable, 2020

Consider This ...

- When considering our long-term happiness and satisfaction, if we shouldn't worry about money, what should we think about instead?
- What would you say to someone who told you that they want to be rich?
- How could you turn the service of financial planning into an experience that engages your clients, and helps them live their best possible life?
- Are you interested in a personal Serious Shift?



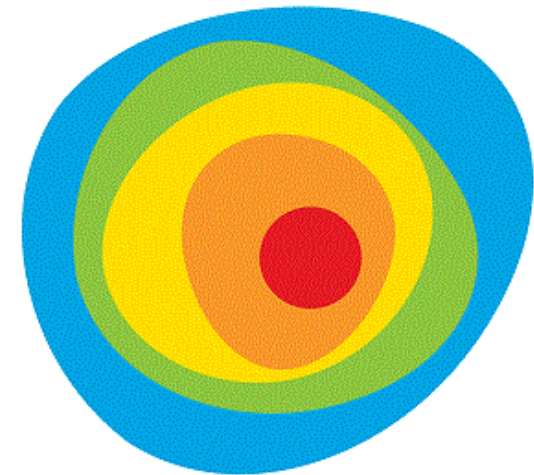
WHO ARE YOU
HELPING
YOUR CLIENT
BECOME?



Thank You! Let's Get Social



Dennis Moseley-Williams



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