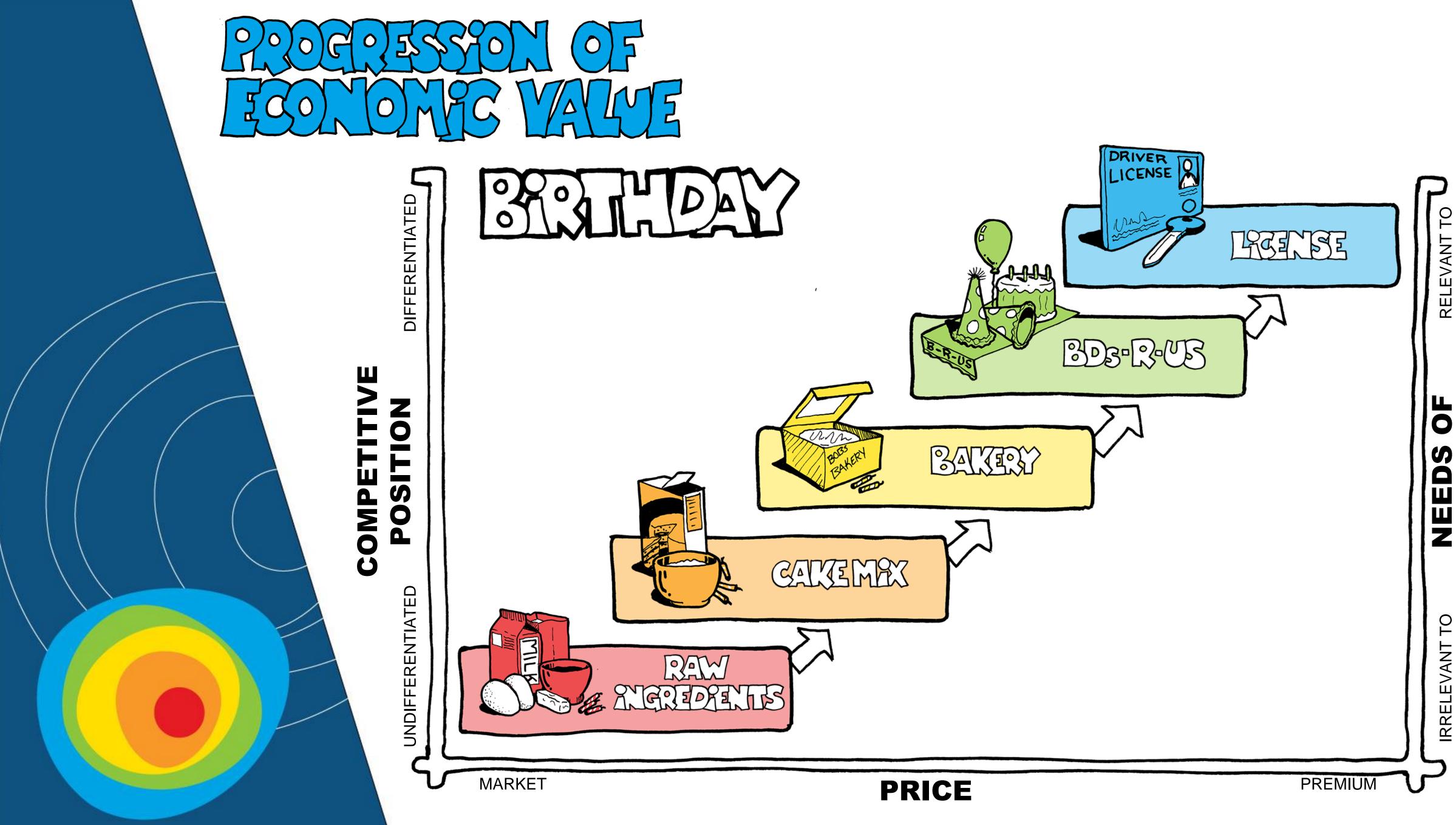
#### Serious Shift: **Shifting From Advisor To Advocate**



Dennis Moseley-Williams dmw@moseleywilliams.com

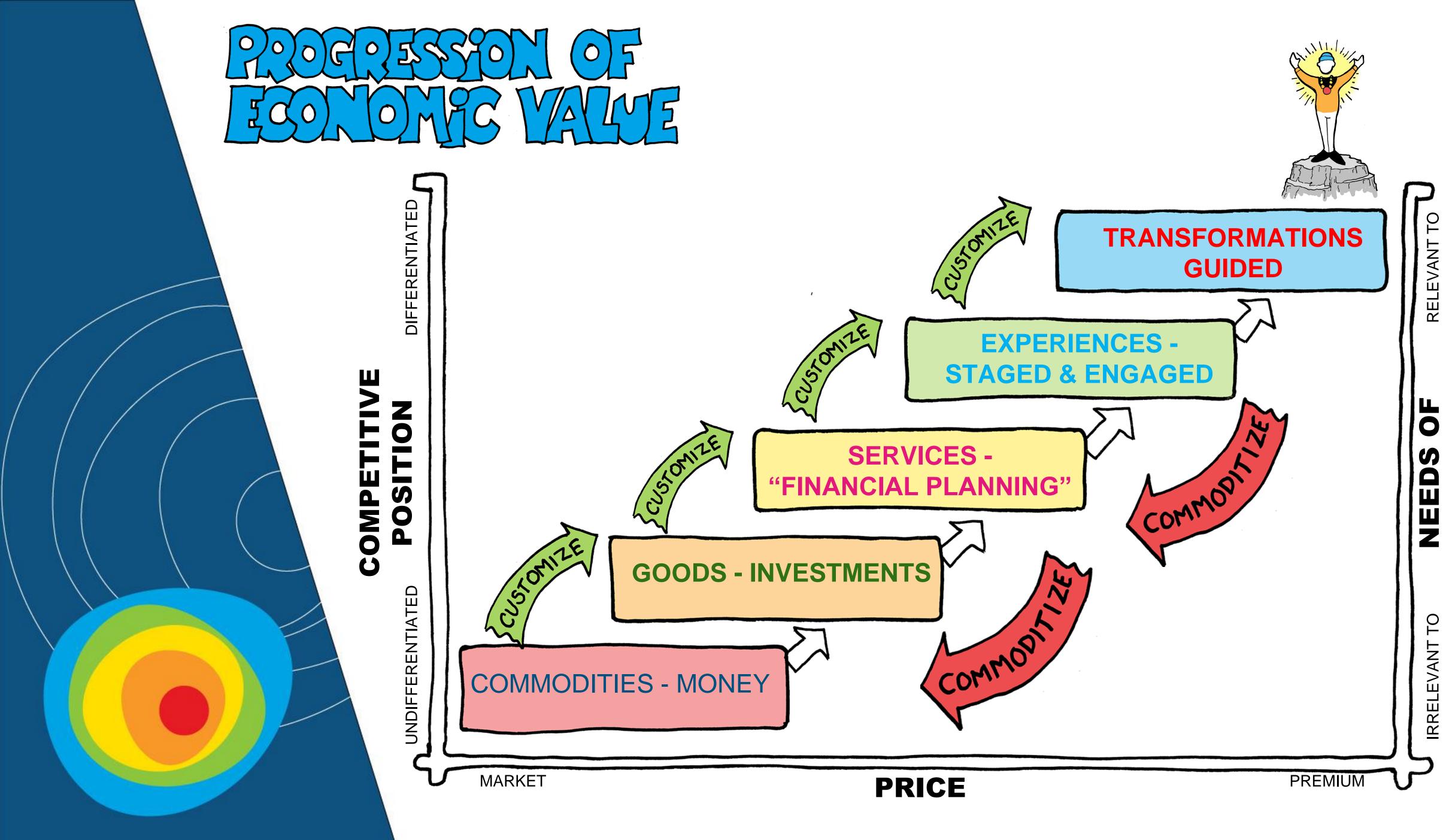






**CUSTOMER** 

### SERIOUS SHIFT - 1 KNOW WHAT BUSINESS YOU'RE IN



CUSTOMER



Raising the Bar: The financial Services **Client Experience July 2021** 





of U.S. consumers would share their personal data for better service and perks

> 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.'"



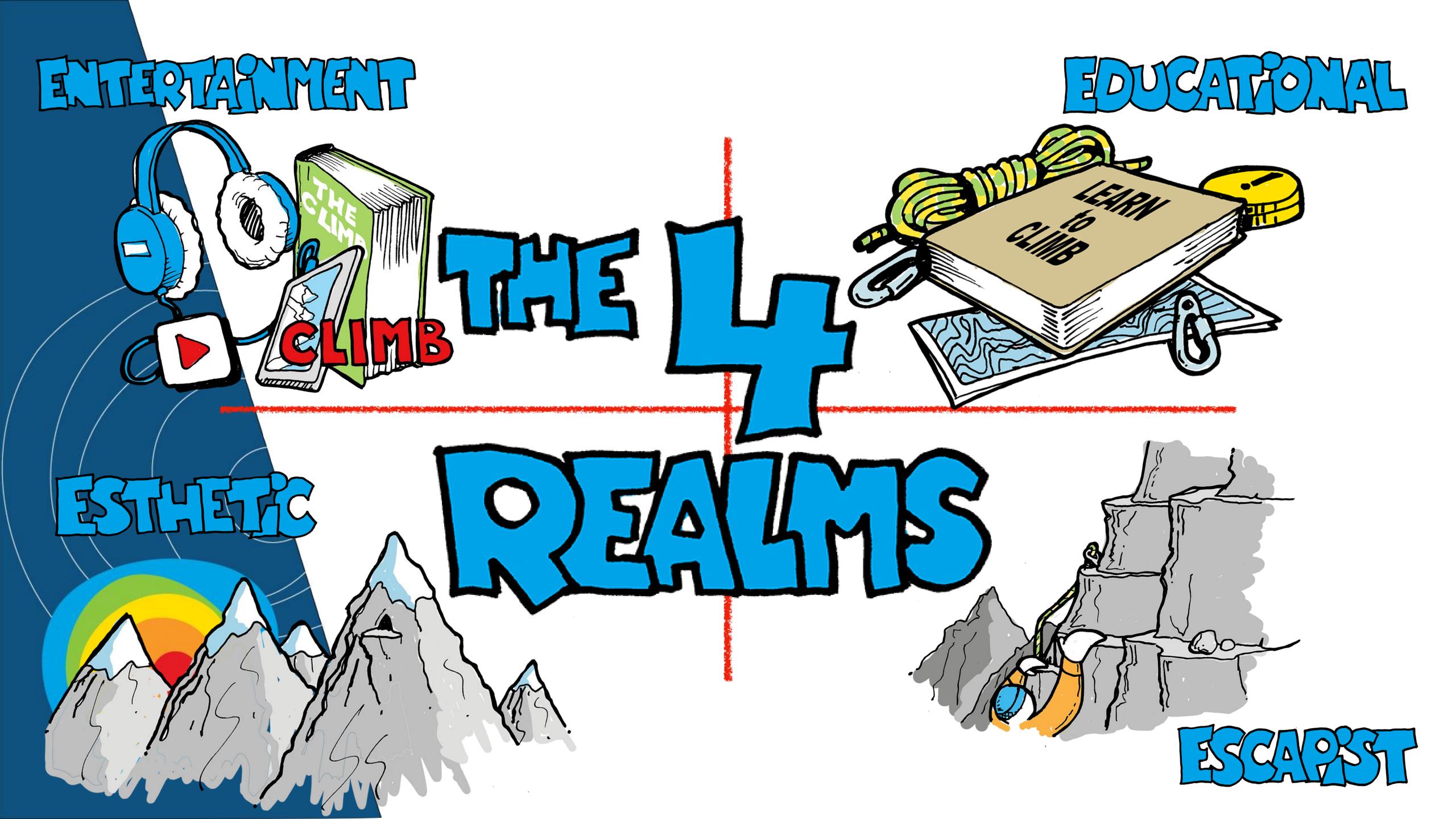


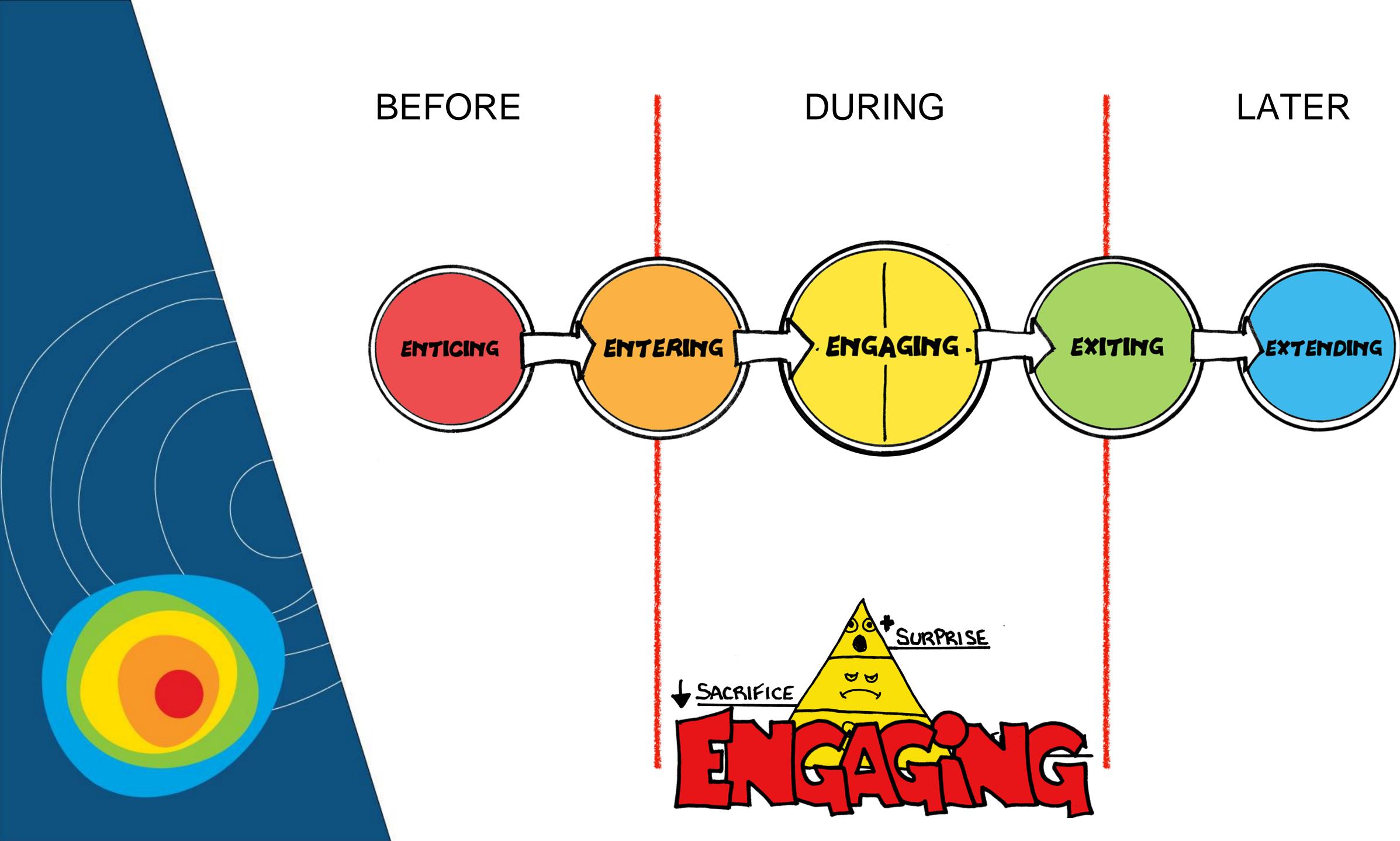
### SERIOUS SHIFT – 2 CREATE TIME WELL INVESTED



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

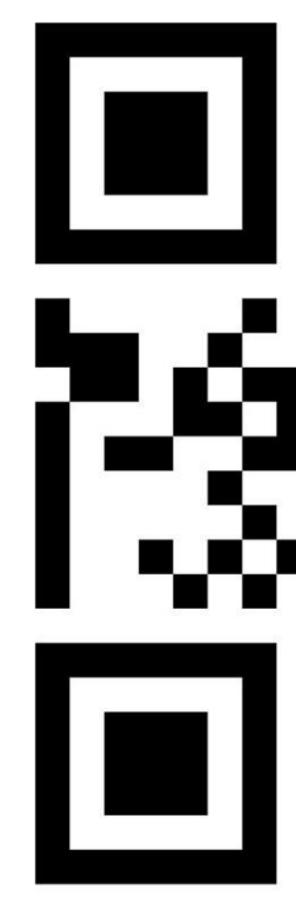


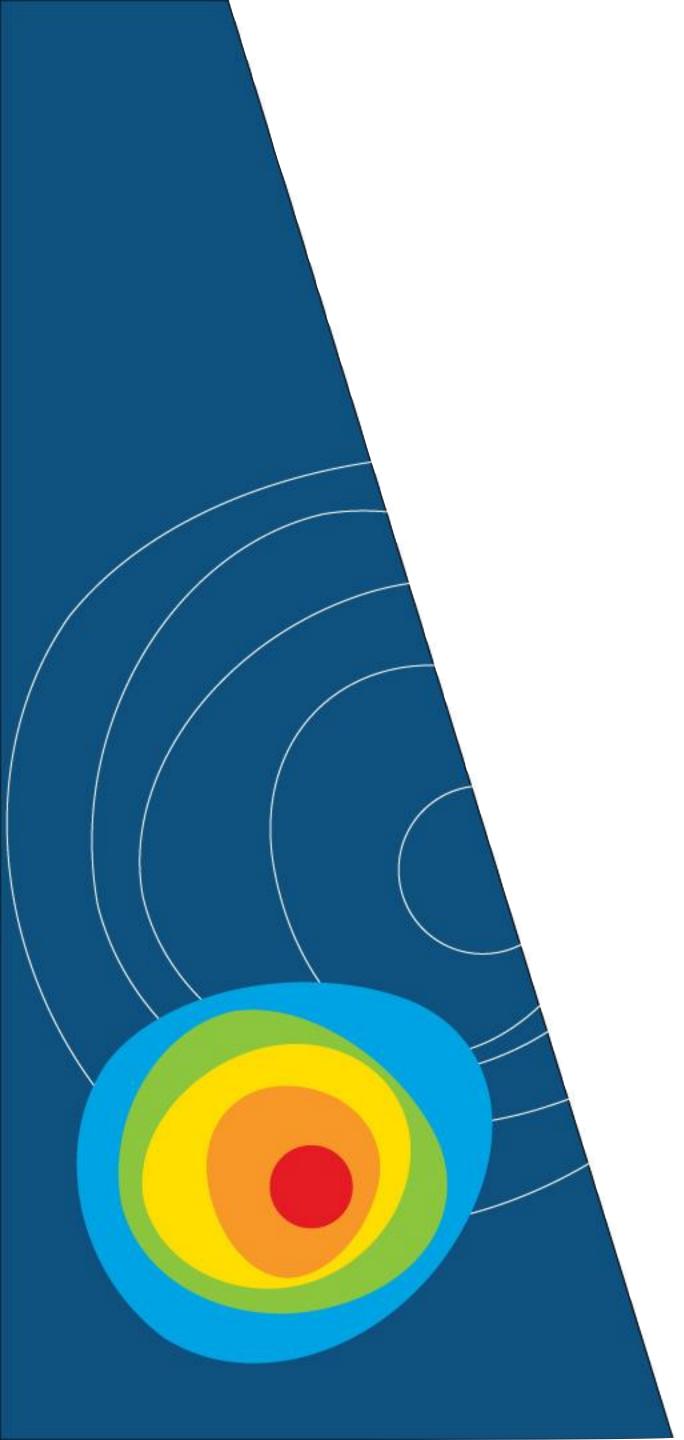






### SURPRISE – A GIFT

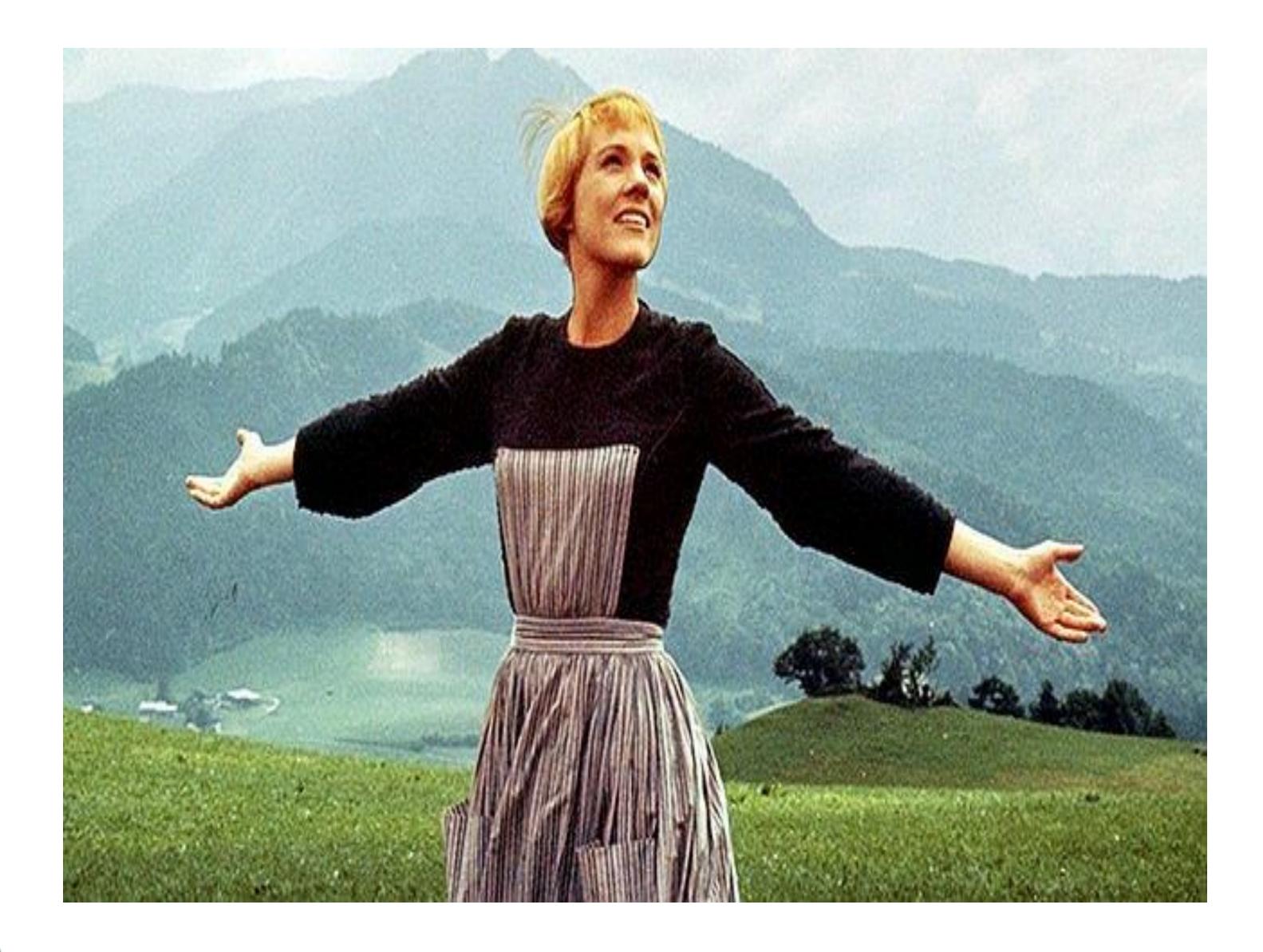






SERIOUS SHIFT – 3 CREATE SOMETHING UNEXPECTED

# Assigned vs. Required Work





# MASLOW'S HIERARCHY OF NEEDS



#### Esteem

respect, self-esteem, status, recognition, strength, freedom

#### Love and belonging friendship, intimacy, family, sense of connection

#### **Safety needs**

personal security, employment, resources, health, property

#### **Physiological needs**

air, water, food, shelter, sleep, clothing, reproduction









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

Younger clients (age 18-3

Middle-aged clients (age 35-

Older clients (age 68

Male clier

Female clier

Single househol

Family househol

Wealthier clients (\$1M+ asse

Small-business own

		15%	
			43%
			51%
3%	) l		
		23%	
2	9%		
		22%	
			40%
		26%	

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

#### **Consider This ...**

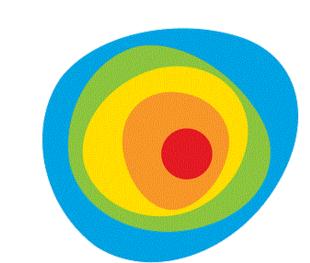
- When considering our long-term happiness and satisfaction, if we shouldn't worry about money, what should we think about instead?
- What would you say be rich?
- How could you turn the service of financial planning into an experience that engages your clients, and helps them live their best possible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

What would you say to someone who told you that they want to

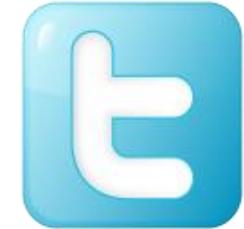
### WHO ARE YOU HELPING YOUR CLIENT BECOME?



# Thank You! Let's Get Social









@moseleywilliams

**Dennis Moseley-Williams** 

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