

This seminar is designed for the advisors who would like to offer **want to evaluate** a fee-based or fee-for-service alternative **for** to their clients. **It's also for** or existing fee-based practitioners who want to review alternative models.

-This detailed presentation will cover: ~~issues such as h~~

- **How to sell your services instead of a product,**~~t~~
- **The menu approach to financial services,**~~h~~
- **How to bundle services**~~and w~~
- **What models are working today.**

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-This session is enhanced by comparing different fee models, the management and collection of fees, and; dispels the myth: *"fee-for-service advisors don't make money"*.

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Have you read the trade publications lately? **It sounds like w** We are all going fee-based. Fee-based works well for the high net worth client, but is it an appropriate model for the middle class and emerging affluent? **Also, Can it cover** the cost of running a practice **has increased substantially and for** clients **who** are demanding a broader scope of services? **Advisors-Will fee-for service need to** better position **themselves-you** to offer financial services on a profitable basis?;

## Learning Seminar Objectives

- To ~~have~~ **provide you with** a *working knowledge* of the significant elements required to run a fee financial advisory practice.
- To ~~have~~ **provide you with** a *basic understanding* of the necessary tools required to implement a change to a fee financial advisory practice.

~~What is important to understand is~~ I am not just talking about starting to put money into a fee-based wrap account and calling yourself a fee advisor. As it is today in all ~~p~~Provinces in Canada, except for the Province of Quebec, ~~anyone~~**body** can call themselves a financial planner or ~~f~~ financial advisor.

What I want to talk about today is a fundamental philosophical shift in how you **value and** approach your business. ~~What I want to emphasize today is the~~ **By the end of the day you will have a better idea -how to** transformation of your business from a product driven practice to a Personal Services Practice and get paid for it.

~~Also,~~ Advisor.Ca did a survey last year<sup>1</sup> on how many people are giving financial advice in this country. As there is no one central registry, the answer was anywhere from 80,000 to 350,000 advisors. Converting your practice to fees is one surefire way to differentiate yourself from ~~the~~ **all this** competition.

<sup>1</sup> ? go and confirm what year and the numbers