



Presented by



The Indispensable Advisor

With
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The Indispensable Advisor

1. Why your 1% AUM fee is under assault and may only be worth 30bps.
2. Why you need a "whole new conversation" to justify your fees.
3. The 10 ways you can add value that clients will pay dearly for.
4. What you can do right now to ensure you don't get fired in the next bear market.
5. Q&A.

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1. Return on Work/Engagement



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2. Return on Residence



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3. Return on Achievement



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4. Return on Learning



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5. Return on Leisure



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6. Return on Health



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7. Return on Relationships



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8. Return on Purpose



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9. Return on Freedom



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10. Return on Security



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4. What you can do right now to ensure you don't get fired in the next bear market.
 - a. Add value beyond money management (financial planning and advising on ROL).
 - b. Indispensable Advisor training program.

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1. Questions?
2. Learn more at:

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