ROL Advisor

Increasing Human Impact as You Deliver Advice

Mitch Anthony

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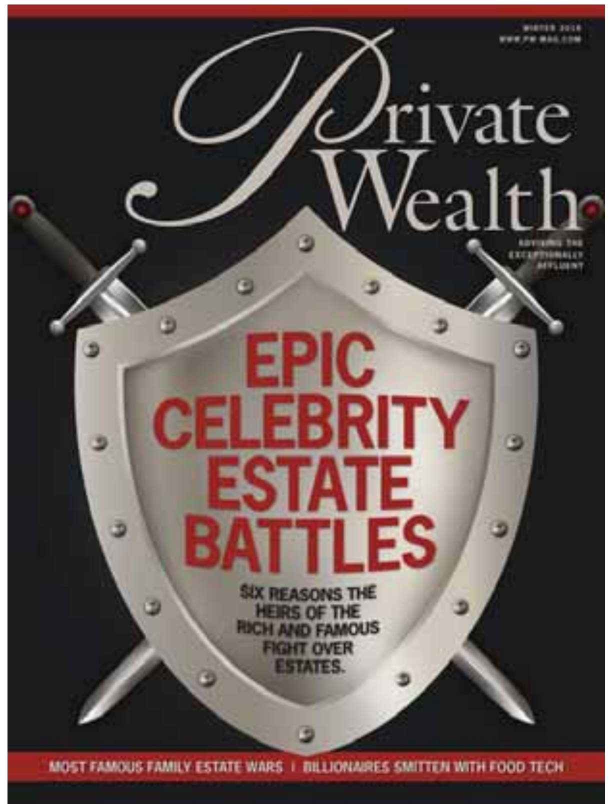

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Where We're Going

1. Why now is the time to increase your human impact.
2. The 4 prefacing truths.
3. How to leverage communication and discovery factors tied to money management.
4. How to deliver intangible value that is more felt than measured.

Where We're Going

1. The 3 big questions that will keep you connected to clients over time.
2. Why the new generation of investors wants to dialogue about the journey, and not so much about the destination.
3. Q&A.

Communication Examples

Use these ghostwritten blog posts to communicate a "life" approach rather than a "money" approach.

Download the free posts at:

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ROL Advisor

Savings: Does Your Desire to Save Match Your Reality?

Transforming the Way the World Plans

Increasing Your HUMAN IMPACT As You Deliver Advice

We All Want to Work With Great People

4 Prefacing Truths

1. People behave as they are wired to behave...we must become a student of people and behavior.

2. Authentic emotional connection precedes material progress...must be genuine in my motives.

4 Prefacing Truths

3. All people are seeking significance....inspiration trumps information.

4. Those who make the greatest difference are those who are intentional about making a difference....money is not the ultimate scorecard.

The Role of History

Blueprints and Fingerprints

Measuring What Matters Most

ROL Index

Score 56

Making Progress

Your ROL index indicates that you are making good progress in your life and that a few areas could benefit from further emphasis.

Your top two areas of highest ROL are **Achievement, Work** and your lowest two ROL rankings were in **Health, Purpose**.

Well-Being

Score 46

Leisure 45

Health 25

Relationships 70

Progress

Score 70

Work 75

Residence 65

Achievement 90

Learning 50

Freedom

Score 46

Purpose 35

Autonomy 40

Security 65

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Felt, Rather Than Measured Intangibles

1. Organization
2. Accountability
3. Objectivity
4. Proactivity
5. Education

The Three Big Questions

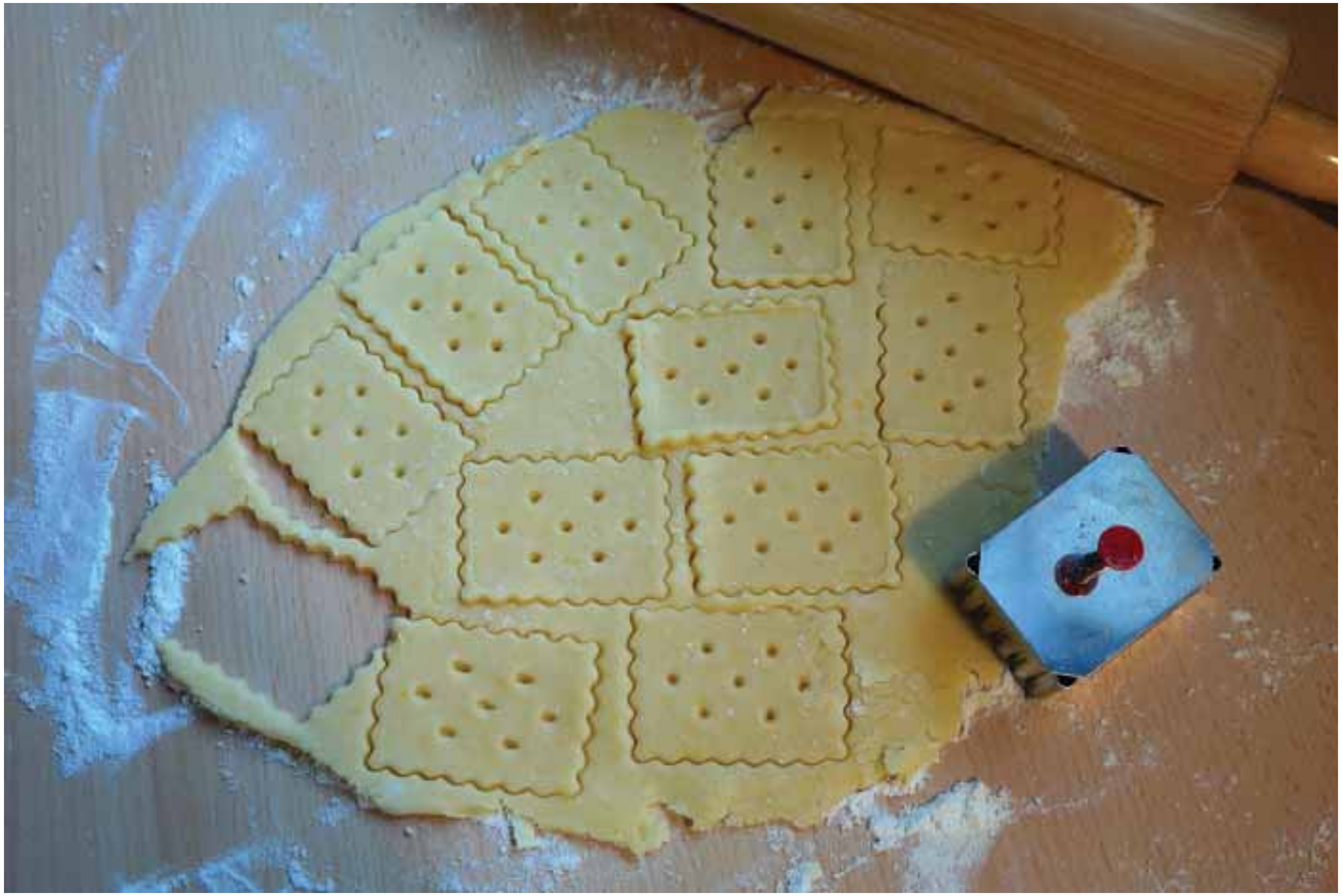
The Journey, Not the Destination

It's Not About Retirement. It's About Now.

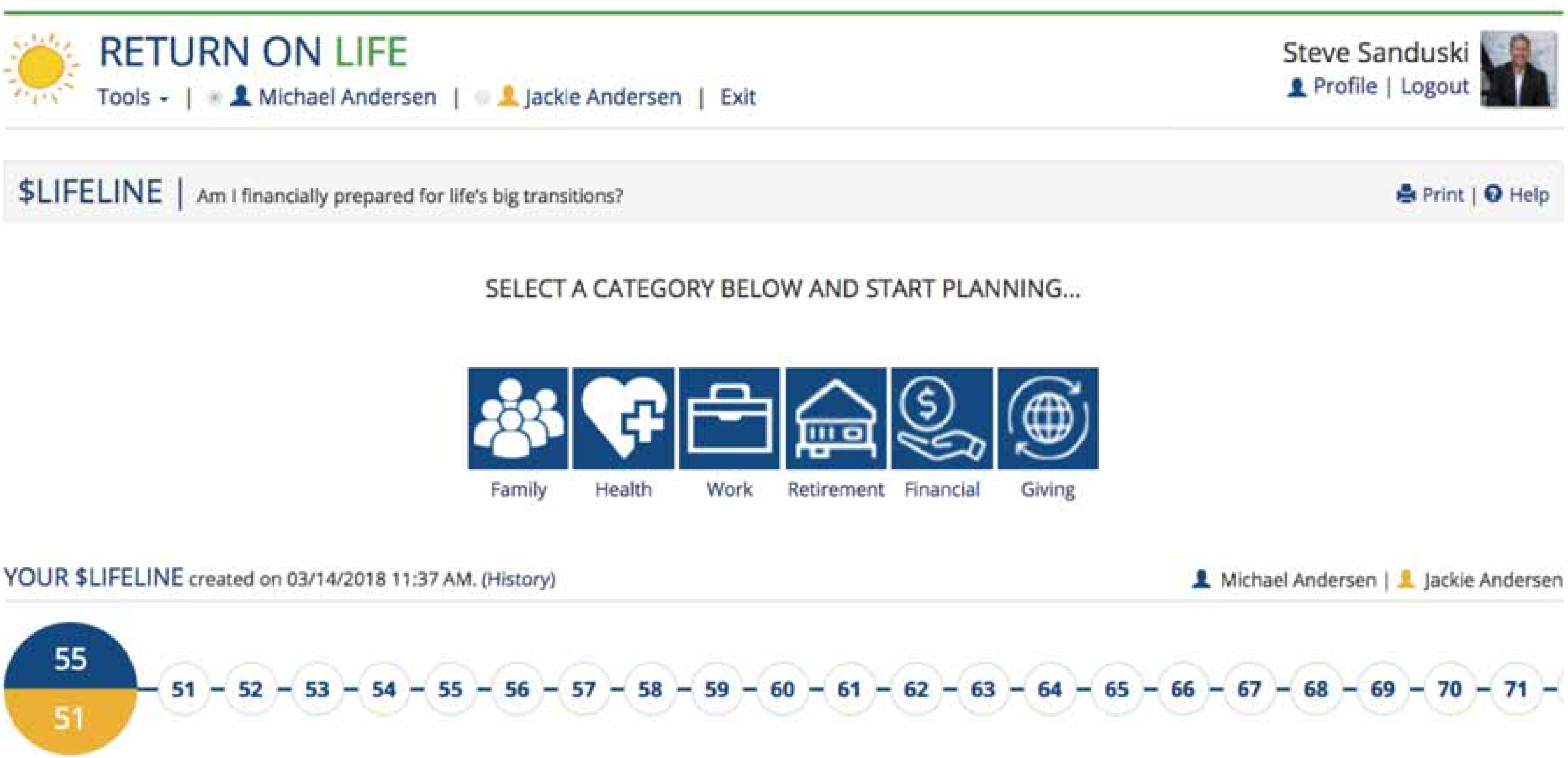
The Journey, Not the Destination

It's Not About Numbers. It's About a Story.

The End of Cookie Cutter Planning



The $Lifeline Breakthrough



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The Power of Pro-Activity

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Questions and Answers

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