

Upsize Your Deals Through Legacy Planning

Accelerate client action with practical strategies



In this impactful 1-hour keynote, discover how to upsize your deals by leveraging legacy planning strategies that drive immediate client action. Learn four key approaches to demonstrate the value of income protection plans in addressing unexpected events, succession planning, business continuity, and wealth equalization. Gain practical, actionable tips designed to resonate with clients, showcasing how these strategies can safeguard their financial future. This session will equip you with effective techniques to communicate the urgency and importance of legacy planning, inspiring clients to make swift, informed decisions. Elevate your advisory skills and drive significant results by mastering the art of motivating clients through strategic legacy planning.

- ✔ Boost your advisory impact with 4 key legacy planning strategies.
- ✔ Gain hands-on, practical strategies designed to resonate with clients and spur immediate action.
- ✔ Enhanced client engagement skills to motivate your clients to make swift, informed buying decisions.

Reignite Your Fire & Race To The Finishing Line



You are at the half-way mark now in the year, but you are already slowing down. You know that you can do it, but you are starting to feel the fatigue setting in and your energy draining. If you are looking for that extra push to propel you forward for the rest of the race, this is the one for you. Coming from a practitioner who has been in the insurance business for a decade and constantly motivating countless sales professionals to continuously outdo themselves for decades, you will learn not just the "how" but discover the big "why" that will reignite your fire and keep on racing to the finishing line with a bang.



Discover your "Why" and overcome your self-limiting beliefs to keep outdoing yourself.



Learn from the success stories of how other financial advisors thrive during post-Covid time.



Be equipped with powerful questions to open up minds and to help clients buy.

Take The Leap Of Faith

To scale greater heights



Are you happy with where you are at this stage of your career? Are you also questioning yourself everyday if you are truly optimizing your talent and fulfilling your purpose in life? There may be people who have been encouraging you to take the leap of faith to try new approaches to selling in the new world; or they may also be naysayers who tell you that you are too old to try something new or it's too risky to reinvent the wheel. At the end of the day, we are a result of our own choices. In this keynote, you will be inspired by personal life stories, tips and techniques to help you overcome your self-limiting beliefs. Take the leap of faith and tell yourself, I can do this!



Discover your “Why” and overcome your self-limiting beliefs to take the leap of faith.



Learn from the success stories of how others have built up the courage to embrace change and new challenges.



Be equipped with effective self-coaching techniques to empower yourself to be resilient and successful.