

Powerful and Practical Services for Financial Advisors[©]

*Service Offerings for Financial Advisory
Firms, Associations, Broker/Dealers, and
Related Organizations*

- Coaching
- Consulting
- Group Programs
- Client and Staff Events
- Public Speaking, Webinars, and Workshops
- Custom-tailored Services
- Open Mic[™] Teleconferences



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**“Ed Jacobson is an innovative force
in the financial planning profession.”**

Bob Veres, *Inside Information*

Overview

“These are the best of times.” “These are the worst of times.”

In the best *and* the worst of times, all of us must keep going, delivering, and growing. Financial firms need to help their members perform and thrive in amid uncertainty and anxiety, and support and motivate their clients confronting uncharted terrain. Each of us must keep our focus not only on short-term goals, but on *our hopes and visions for a life fully-lived*. To do so, we can leverage the insights, methods, and tools of Appreciative Inquiry (AI), Positive Psychology, and Change Management. A master practitioner in all three domains, I bring 35 years of professional experience, knowledge, insights, and wisdom about “what works,” and about how to get there.



Offerings

Coaching Many advisors are seeking to take their practice and their business – and maybe their life – to the next level. In my coaching relationships, we focus on the client’s greatest strengths and proven successes, and on what that next level really looks like. We then leverage their strengths and resources so they can be successful in getting to that next level – or beyond.

Consulting I work with firms, associations, and other groups seeking to define and implement their strategic direction, enhance their performance, increase client and employee satisfaction, and/or address other mission-critical goals. Areas of special expertise include: managing and leading change; developing alignment on vision, direction, and values so that everyone “speaks (and acts) with one voice”; and adopting more positive, strength-based, innovative processes and cultures.

Group Programs Coaching, training, and education, in virtual and in-person formats. The Path of Appreciation and Positivity™ is a six-month virtual group program for incorporating the insights and tools of Appreciative Inquiry and Positive Psychology into one’s personal life and work. Coming in 2011: small tele-group and webinar formats of Power Tools for Planners™. I also offer group programs to support financial life planners’ continued growth.

Client and Staff Events Presenting and facilitating client and/or staff dinner meetings, seminars, and retreats designed to celebrate, educate, and build community. Includes firm-wide meetings for professional and personal enrichment, team-building, strategic planning, year-end “appreciative reviews,” and other purposes.

Public Speaking, Webinars, and Workshops Keynotes, presentations, and training workshops on working and living more effectively, with greater satisfaction and meaning, and with more successful outcomes. Please contact me for a list of current topics, including the most recent one, “Power Tools for Planners™.”

Custom-tailored Services Customized training events, client materials, retreats, and other products and services to address an individual’s or organization’s unique requirements.

Open Mic™ My free, monthly teleconference for planners world-wide. We discuss topics of emerging interest, and we build knowledge, wisdom, and community. For schedules and written Recaps, see www.EdwardJacobson.com.