Powerful and Practical Presentations for Financial Advisors©

A Range of Offerings for Financial Services Firms and Associations, Broker/Dealers, and Related Organizations

"Ed Jacobson is an innovative force in the financial planning profession."

~ Bob Veres, *Inside Information*

Ed Jacobson, Ph.D. | Ed@EdwardJacobson.com | Phone: (608) 345-3332 | www.EdwardJacobson.com

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

Whichever statement you agree with – or even if you agree with both – all of us must keep going, keep delivering, and keep growing. Financial services firms must help their members to perform and thrive in the face of uncertainties and anxieties, and to support, guide, and motivate their clients in this era of the “New Normal.” Each of us needs to manage our own distress, grow our skills, and perceive and pursue the opportunities inherent in transformational times – all the while keeping our eyes not only on short-term performance goals, but on our long-term vision for a richly-rewarding work and life. In this pursuit, we can greatly benefit from the insights, approaches, and methods of Appreciative Inquiry (AI), Positive Psychology, and Change Management.

Ed Jacobson, Ph.D. is a master practitioner in all three domains. Ed brings his 35 years of professional experience, his mastery of these frameworks, and his insights and wisdom to the offerings described in this document. But first, a capsule description of each framework:

Appreciative Inquiry (AI) is a positive, strengths-based approach to personal and organizational change. AI shifts people’s attention away from *problems* as the motivation for change, focusing instead on *capacities, success, vision, and innovation*. ***Positive Psychology***, barely ten years old, is already producing remarkably practical tools and approaches for creating flourishing individuals, workplaces, and families. And ***Change Management,*** a field of knowledge devoted to helping people and organizations effectively navigate transition, change, and transformation, has special relevance for our times.

Those who have been introduced to Ed’s presentations, workshops, coaching, and consulting have recognized the power of his practical, integrated approach to help them:

- Rapidly assess their current situation *and* their strengths and resources;
- Build close and enduring connections between people;
- Create a compelling, shared, positive vision of their desired future, which serves as the centerpiece of the resulting strategy and action plan; and
- Increase people’s motivation, resilience, and skills for working in a unified manner to achieve the vision, the strategy, and the action plan.

“Ed has a unique ability to help stimulate, motivate and inspire growth and change. His approach serves as a centerpiece for treating people with respect and consideration while getting the most out of each relationship.”

~ Michael Kay, CFP®

Ed has created a range of breakthrough presentations and workshops which are receiving rave reviews, both here and abroad. Please turn the page for a list of topics.

Presentations and Workshops are Available on the Following Topics:

Signature Offerings

Harness the Power of Appreciative Financial Planning™ for Your Practice and Your Life introduces the appreciative approach, which Ed has developed for the profession. Includes experience in conducting appreciative interviews, receiving 25 powerful questions for use throughout the planning process, and building an appreciative, strength-based business.

Reenergize and Renew Your Relationships with High-Impact Client Review Meetings© shows planners, in detail, how to create clients-for-life through hosting powerful client review meetings. Includes specific topics, questions, a detailed interview outline for each of the four phases of the review meeting, and the Life Abundance Portfolio©. Equips planners to reenergize and renew their relationships, beginning with their very next client review!

Power Tools for Planners™: Essential Equipment for Great Relationships and High Performance Core skills and capabilities for deeper relationships, enhanced effectiveness, and increased well-being. Ed introduces the tools, and provides 18 Practice Tips and exercises to drive home the tools' importance. ***Power Tools:*** truly "basic equipment for success."

New Offering!

Positivity for Planners: Using the Power of the Positive to Benefit Your Clients, Practice, Family…and Yourself Positivity works! Focusing on the Positive, the Potential, and the Possible produces deeper relationships and greater productivity and profitability – <u>and</u> better health and longevity. Ed introduces six positivity skills, describes their benefits, and presents 16 practices for strengthening them.

New Offering!

How to Show Up at Your Best for Prospects, Clients… and Everyone Else: The Relationship Toolkit Ever wonder how high-performers do it– how they consistently show up, connect, and deliver? In this impactful session, Ed combines his 35 years of professional experience and the latest research to bring you a Relationship Toolkit that positions you to *really show up* when you show up. The five relationship tools aren't the usual suspects; prepare to be surprised…and to benefit!

Personal Resilience: a Key Skill for Advisors, Staff Members, and Clients, in Difficult Times educates participants about personal resilience, and engages them in an exploration of their own resilience skills and experiences. A highlight is the customized Personal Resilience Toolkit© and the Personal Resilience Action Plan© that participants will create for themselves, as well as other concrete materials they can use to apply these concepts with their clients and staff members.

> ***"Ed's presentations foster an attitude of gratitude. You will take with you communication skills that create positive client interactions and outcomes. Appreciative financial planning is an interpersonal communication skill set that assists the planner in combating the pervasive negativity and financial porn our clients are subjected to in this 24/7 world."***
>
> **~ Neal Van Zutphen, CFP®**

Happiness in "The New Normal": How to Have the "What Really Matters to You?" Conversation with Clients (and Yourself) Ed shows how we can live *productive, pleasurable and meaningful lives*, even (or especially) in these times! This session introduces his Happiness Strategies Profile© and The Route Map of Happiness©, and shows how we can find happiness and meaning in our own lives, and point the way for our families, clients, and colleagues.

Self-Care for Advisors (and the Rest of Us) Are you taking care of yourself, so you can perform with consistency and effectiveness, and be there for employees, partners, clients, and family? Ed reviews six sources of instability and distress, presents eight strategies for optimal functioning, provides guidance in creating an effective self-care regimen, and shows how to have Self-care Conversations with colleagues, clients, and family!

Appreciative Legacy Planning presents a focused process for building your long-term legacy. Participants envision the "footprints" they seek to leave on the world, and create action strategies to etch their most desired legacy. Ed shows how to apply this process can be applied with clients, with powerful results.

Getting Real About What "Rich" is: The Abundance Conversation™ is the right conversation for these times. Ed presents contrasting meanings of "abundance" and guides participants in completing their own Life Abundance Portfolio©, creating actions to build true abundance, and learning how to have The Abundance Conversation™ with clients.

Sample of Presentation Venues

- FPA Experience (national conference)
- FPA Retreat
- IAFP (Canada) (Keynote)
- FPA of Australia (Keynote)
- AICPA Advanced Financial Planning Conference
- Transamerica Financial Advisors (Keynote)
- Schwab Institutional
- Kinder Institute Life Planning Conferences
- Garrett Planning Network Retreats
- Money Quotient Retreats

References

Marv Tuttle, CEO, Financial Planning Association

George Kinder, CFP®, Founder, Kinder Institute of Life Planning

Sheryl Garrett, CFP®, President, Garrett Planning Network

Susan Bradley, CFP®, CEO, Sudden Money Institute

Marty Kurtz, CFP®, Board Chair, FPA

Elizabeth Jetton CFP®, Former Board Chair, FPA

Carol Anderson, Founder and President, Money Quotient

Ed Jacobson is a 'Superman' thought leader, facilitator and mentor wrapped up in an unassuming 'Clark Kent' package. Don't let his calm demeanor fool you...Ed guides with insightful questions, keen listening skills, breadth of knowledge and range of experiences, making him ideal for everything from keynotes to mastermind meetings for groups of other thought leaders to ongoing coaching/mentoring. If you need a fresh approach that combines keen intellect with a calm yet magnetic delivery, Ed is your man!"

~ Phil Dyer, CFP ®, RLP ®, CPCC

Ed Jacobson, Ph.D., M.B.A.

Biographical Sketch

Ed Jacobson is a psychologist, coach, business consultant, and public speaker, based in Madison, Wisconsin, USA. Ed's had several careers — as an academic psychologist, a mental health executive, and a consultant in the for-profit world of KPMG Peat Marwick. His current practice -- his capstone career -- includes coaching, consulting, training, public speaking, and writing.

Since being introduced to the financial planning profession in 1999, Ed has increasingly focused on serving financial planners and related professionals, because he understands that advisors seek to make a profound difference in their clients' lives, and he enjoys contributing to this important calling.

His work has centered on the application of Appreciative Inquiry, Positive Psychology, and Change Management to the financial planning process and to the business of running a successful. This positive, integrated focus has been enthusiastically embraced by financial advisors and their clients.

In response to the ongoing instability and uncertainty which first beset the financial world in September 2008, Ed developed a groundbreaking approach to assist planners in coping, adapting, growing and ultimately, flourishing. His presentations and workshops on powerful conversations, positivity skills, personal resilience, planner self-care, and mastering "power tools" for effective relationships have helped advisors to perform at their best, transcend adversity, and guide their clients and employees in navigating the "New Normal."

Ed is a frequent keynote speaker and workshop presenter at financial planning meetings and broker/dealer conferences of all kinds. He is a columnist for the Garrett Planning Network's Newsletter and is a senior Trainer and Mentor in the Kinder Institute of Life Planning.

He hosts a free monthly teleconference, ***Open Mic™,*** for financial professionals around the world, to discuss what's working well and what's not, in these demanding and stimulating times. See **www.edwardjacobson.com** for Open Mic schedules, call-in information, and links to audio recordings of Open Mic hours. Ed's the author of ***Appreciative Moments: Stories and Practices for Living and Working Appreciatively***, and is at work on two e-books: ***Positivity Skills for Professionals*** and ***The Relationship Toolkit: How to Show Up at Your Best***. Each is due out in 2012.

For more information about Ed's services, or to schedule an appearance, please contact Ed at **ed@edwardjacobson.com** or 608-345-3332. (Internationally, call 00-111-608-345-3332.)