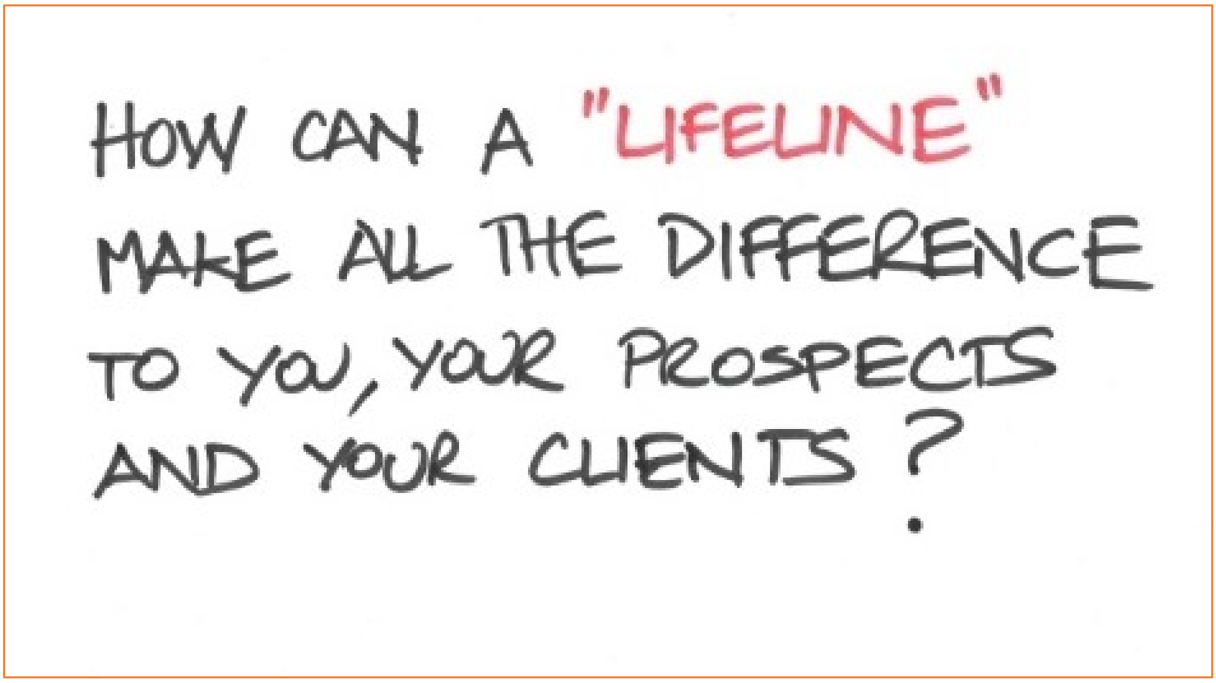
How can a "lifeline" make all the difference to you, your prospects and your clients?



Do you ever wonder why that 38 year-old that you just met for the first time wasn't that interested in planning for their retirement when it will be one of the 2 largest and most challenging financial events of their life?

Chances are, like most people, they just do not understand how huge this challenge will be, how far they are behind where they need to be right now or that they are already half-way through their working life!

Chances are they have only accumulated 15 or 20% of the lump sum that they will need to be able to do what they want to do during their long retirement years. The fact is, though, this will be one of their 2 most significant financial challenges – losing their income and losing their income, either at retirement or if they suffer a significant health event or death.

"And, it's no wonder most people don't get it given that retirement is a once in a lifetime event that you don't get to pay off or a 2nd chance at, as too often most people realise only when it is too late"

So how can you help them to get it?

Well, I have been using a Lifeline mind map in client interviews and when presenting at seminars for more than three decades and the results are always amazing. Most importantly, it will enable your prospect or client to discover their needs themselves, without you having to tell them!

Whether you utilise an A3 sheet of paper, or a whiteboard, when drawn with skill and the use of effective discovery questions, a Lifeline will:

- Provide you with a fantastic framework for your discussion
- Enable both you and your prospect or client to easily build their life story and bring it to life
- Context time and the motivation they need for urgency to plan and act
- Help them to visualise where they are, how they are tracking and just how challenging the road ahead is going to be
- Enable you both to easily build their story and bring it to life
- Provide you with a robust, effective framework for your discussion
- Create a highly effect mind map that you can add to your SoA or presentation

To master the use of a Lifeline requires best practice insights, coaching, effective discovery questions and practice – but when mastered it will change everything for you, your prospect and your client!

The initial elements of creating and using a highly effective Lifeline that I have touched on today are all built into the highly immersive one day face-to-face workshop that sits at the centre of our **GROW Adviser Capability** program. In this program we explore these topics in greater detail to further build your understanding, together with enabling effective practice and our disciplined implementation program to ensure that you master and embed the skills in your business as a daily core practice.

Jason Dunn *has developed, implemented and executed change, engagement, turn-around and transformation program strategies across a diverse range of institutionally and privately owned financial advice businesses over 35 years. While his experience is broad, Jason is effusive about creating exceptional client experiences based on thousands of hours of direct client engagement.*