Premium Tools

Behavioral Presentations
Several presentations in Power Point with transcript to brand as your own and present to clients and prospects and/or make your own video from them. Helps you differentiate yourself from others and teach how mental shortcuts and emotions influence our decision-making process…and why they need you.

On Boarding Tool
Create a process for on-boarding a new client, beginning with the first impression. Demonstrate you are different and completely transparent about your business. Several templates provided to customize to your practice and offerings. Includes marketing ideas and risk/behavioral profiling. An advisor favorite! No other advisors do it like this.

Communication Assessment
Five question assessment takes less than three-minute to fill out, yet provides a lot of information about how the client wants to be communication with. We tend to communicate with others the way we like it. But if you really want to deepen relationships, you need to communicate the way the client wants it. Includes assessment, report of advisors and a report for clients.

Behavioral Bias Questionnaire
Ten questions to identify if investor has one or more biases along with a key of how to work them given the bias(es). A way to know your clients more and demonstrate the value you are providing.

Improve Website Engagement
Use your free coaching calls to learn about the psychology of engagement and make adjustments to your website to ensure it is an asset in your quest to engage current clients and impress prospective clients. Earning a prospect's trust (before you meet) and making your website desirable for clients to share is a significant take away. Leverage your most valuable piece of marketing real estate.

Premium tools are available only for Premium members of The Behavioral Finance Network.
Premium members are limited to 200 to keep material unique and exclusive.