SUCCESSFUL TRANSITION PLANNING INSTITUTE

Clarity. Opportunity. Meaning. Purpose.

TRANSITION ADVISOR PROGRAM

Guiding Baby Boomers through Change

Training Program for Advisors, Coaches and Consultants

The Successful Transition Planning Institute (STPI) offers a training program to advisors, coaches and consultants who want to offer short coaching programs, workshops and assessments to Baby Boomers.

What's Next? Coaching™ program for Baby Boomer business owners

Explore Coaching™ program for late career professionals

Finding your New Owner™ workshop for business owners

Explore Workshop™ for late-career professionals

Decision-Making Style Questionnaire and Report (on-line assessment)

Baby Boomers represent a market of 78 million people in the US. According to KPMG, about 10,000 turn 65 each day. In 2015, the global number of people age 65 or older is 750 million, by 2020 it will be over one billion. That is a large population going through a lot of change.

STPI's training provides the confidence for you to conduct short coaching sessions with Baby Boomer business owners, executives and professionals. The planning principles in this program also provide the framework for you to connect with your clients on a deeper and more personal level. The methodology will also give you insights to your business owner clients' business issues.

Numerous benefits of training in these short coaching programs

New Revenue:

- New source of revenue from delivering the programs
- Provides door-openers for your other services
- Creates more "touch points" by being able to go deeper with owners
- Opens up intangible "Rain Making" opportunities

Marketing Advantages:

- New offering gives you a competitive edge over others in your field

- Raises you to the position that of most trusted adviser status by providing personal support that other advisors are not
- Co-branded guides to use as lead generation tools on your website
- Co-branded book *Finding Your New Owner: For Your Business, For Your Life* with your marketing message, logo or photo

Business Development:

- Overview presentation of the "soft issues" that hold owners back
- PowerPoint presentation and flyers are provided for you to sell the programs
- Global exposure with listing in STPI's online Advisors Network
- Receive ongoing business development support from the Successful Transition Planning Institute
- Opens up new referral sources by working with professionals involved in personal and business transitions

What's Next? Coaching Program™ for Baby Boomer Business Owners

(content is same for half-day Finding Your New Owner™ workshop):

Over the years we have heard many advisors say that the "soft issues" are the "hard issues" in exit planning. We have attended numerous exit planning conferences and have heard the request of advisors for simple tools that they could use to help owners start the exit planning process. What's Next? Coaching Program provides you with such a needed tool.

The training program solves the problem of advisors in trying to fill the seats in exit planning presentations since the program does not notify competitors that owners are thinking about leaving. The educational program allows owners to know the questions and answers that are involved in making a successful business transition to new ownership, as well as personal transition to a new life after leaving their companies.

The difficulty of engaging owners in the exit planning process is analogous to advisers walking owners to a swimming pool and asking them to just jump into the deep end. Many owners are not ready to take the plunge, don't know how cold the water is, so they just walk away. This coaching program allows you to walk owners to the shallow end of the pool, and ask them to just put their foot on the first step, which slowly allows them to become acclimated to the exit planning waters, feel comfortable and go deeper.

STPI will train you how to use this proven program which helps you effectively deal with the "soft issues," yet remain as an expert in your current practice in the eyes of the owner.

This short coaching program extends your practice while staying close to your comfort zone by its not going too deep into emotional issues. Also its modular exercises format allows you to choose to work with exercises that you feel most comfortable with.

The questionnaires, exercises and to-do-checklists that you will use in this guided coaching program provide owners with clarity and knowledge of the unknowns, giving them peace of mind. The coaching program combines the What's Next on-line assessment with a 2 or 3 short coaching sessions using the proven 32 page guidebook that help business owners become unstuck, and get serious about planning their transition.

Outcome of the Program for Owners:

You will be able to help owners successfully address the personal and emotional side of transitioning out of their businesses, and help them avoid experiencing Owner's Indecision and Seller's Remorse. The fact is that owners leaving their companies may be the most significant transition of their adult lives. For many owners, leaving a business has almost the same impact as leaving a family. The questionnaires and exercises in the coaching program provide a step-by-step methodology which helps owners think strategically about not only what needs to be done to maximum the value of their companies, it also helps them become emotionally ready to let go of their businesses, find peace-of-mind, build a new personal identity, and begin planning what to do with the next chapter of their lives.

Content of What's Next? Coaching Program

- **Free guide** "WHAT'S NEXT FOR YOUR FUTURE?" How to avoid retirement remorse and "push start" on a successful business and personal transition"

- **Quick online questionnaire:**

— Focuses owners on their personal and business goals and objectives
— Creates greater objectivity to their decision making
— Opens up new business and personal conversations
— Enables owners to express what they feel in a safe format

- **What's Next? Report** presents in a clear and organized way:

– Owners' motivations for wanting to leave

— Their transition goals
— Their attitude and expectations
— How emotionally prepared an owners is for leaving
— If they have a plan for a meaningful and purposeful new lives after they leave their companies

- ***Finding Your New Owner: For Your Business, For Your Life,*** voted Top 10 in Management Books by the 2012 Small Business Book Awards.

  The book presents:

— Stories of successful and unsuccessful transitions
— Step-by-Step advice to get moving
— Exercises to motivate owners to change
— 200 pages, larger type size for middle-age eyes

- **What's Next Coaching Guidebook**:

  - **Allows *objective assessments*** of owners personal and business goals and objectives, by incorporating basic planning principles

  - **Focuses owners on subjective financial hurdles** that can sabotage them from making a successful transition

  - **Accelerates owners making** a successful business and personal transition by helping them do an accurate appraisal of themselves

  - **Avoids owners feeling uncomfortable** by sharing their inner-most thoughts in a room full of strangers

  - **Provides a non-threatening framework** for owners to talk about key issues that they have not previously raised with their spouse or key employees.

  - **Creates a "neutral third party"** that depersonalizes emotional, financial and business issues

  - **Expands owner's awareness** so they can learn more answers and be able to ask new questions to their advisors

  - **Enables owners to think strategically** about their emotions and the future of their businesses

  - **Provides clear knowledge** of what is involved in the transition process and what steps need to be taken to prepare themselves for the transition process

Content of the *Explore Coaching™* Program for Late Career Professionals (content is same for half-day Explore Workshop™)

Explore Coaching™ provides a framework for late career professionals to navigate the murky waters of transitioning out of their current positions. The coaching program shows them how to start a process for exploring new ideas and how to address their concerns about the next stage of their lives.

The program's proven methodology:

- Delivers peace-of-mind by defining their lives today and after their full -time career
- Helps them embrace the transition they are going to enter
- Be able to step into lives that they have consciously designed

1. Online questionnaire and report for Late Career Professionals

The questionnaire provides people with clarity about where they are and where they are headed. It helps them gain control of their attitudes, hopes, concerns and emotions about thinking about a new future.

The report that is generated will make professionals aware of:

- Their motivations and transition goals
- Their attitudes and expectations about the transition process
- How they feel about leaving their positions
- If they have a purposeful and fulfilling new future that they are looking forward to

2. *The Power of Personal Transition Planning Downloadable Whitepaper* which consists of the following topics**:**

- Getting older is NOT about gliding into the "Golden Years"- instead it's about reinvention into The Platinum Years℠
  - New active stage of life for Baby Boomers
  - The new possibilities for Baby Boomers
  - New discoveries about aging and health
  - How Relationships and Social Connections affect both the emotional and physical well-being

- Follow a "Head and Heart Approach" – strategically creating a new future
    - The emotional side of the transition process
    - The intellectual side of the transition process
    - Determining their intellectual and emotional readiness for Transition Planning
    - Creating a Strategic Transition Plan that includes both the Head and Heart aspects of the Transition Process
    - Expanding their thinking about their future

- Transitioning involves:
    - Why many Baby Boomers don't want to think about leaving
    - The "Transition Process"
    - Expanding your thinking about your personal future
    - Taking time to focus on yourself
    - Learning the "10 Ways to Leave Your Work-life Unsuccessfully, and How to Avoid Them"
    - Planning for successful Life transitions
    - Taking control of your future

3. Two One Hour Guided Coaching Sessions

In the phone consultations, or in person, you will help late career professionals:

- Learn how to think strategically about their emotions
- Define what a successful transition means to them
- Create their transition goals
- Determine their mental and emotional readiness for Transition Planning
- Do a "My Life-Transitions Exercise"
- Describe examples of ways to use their earlier life-transitions to help them with personal transition planning for their new future
- Complete an "Identity Exercise", to see who they are "outside of work"

Online assessment:

1. **Decision-Making Questionnaire and Report** – There are five distinct decision-making patterns that people use when making high-stakes decisions such as "What am I going to do with my life?" or "What am I going to do with my business?" It is important for people to know their primary decision-making process, since it determines how they choose the goals they wish to achieve, obtain information about the issues they have to decide on, assess or analyze data about their futures, and to make and implement their final decisions. The report informs people of their special strengths, how they can use their strengths in making future decisions, and what to avoid.

Include in STPI's Transition Advisor program is training in **psychological and cognitive selling as** well as an **Advisor's Best Practices Reference Guide** which helps you know:

- How to motivate prospects,
- Best ways to have owners execute their decisions with precision,
- Enhancing your ability to help clients achieve their goals.
- Recognizing the overall characteristics of the five ways owners process information, personality styles and their tendencies to act
- Specific presentation techniques that will help you be successful
- Which words to use that most resonate most with the five styles of owners

You can also use this knowledge to sell your accounting, wealth management etc. services.

Training Webinars for the coaching programs include:

- Overview of the fears and issues of business owners and late-career professionals that you will help address
- How to sell the programs to clients and prospects
- How to order the programs in STPI's online Survey Center
- How to join STPI's Advisor Network
- How to use the co-branded lead generation offerings

The educational webinars empowers you help more clients, and to convert more prospects into clients. This enlightened sales training program increases your close ratio from prospects to clients both for programs and for your current services. The webinar then presents an overview and tool that you can use to build faster and better rapport, and helps you make more money by knowing potential clients better.

After participating in the sales training webinar, you will be able to recognize owners' personality and behavioral characteristics, best ways to communicate, techniques to engage prospects and know the best words to use with each decision making style. You will also have opportunities to apply these best practices to sell your services. An additional deliverable of the webinar is that you will have access to an Advisors' Best Practices Guidebook that you can use as reference source to create smoother working relationships with clients over time as you perform your services.

Costs (USD):

- $995.00 - Training Cost plus co-branded guides and STPI logos
    - Includes 15 credits to order online questionnaires our system for first 5 clients
    - One copy of our book, Finding Your New Owner, by Jack Beauregard

SPECIAL OFFER – Co-branded book, Finding Your New Owner - available for a one-time set up fee of $100.00 (Save 50%), or waive set-up fee by purchasing 25 books for $400.00

100% MONEY-BACK GUARANTEE

If after completing the training and experiencing the programs, you feel that this is not a good fit, simply return all the materials and we will refund your entire training fee.