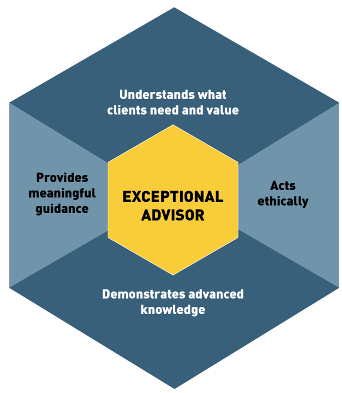
New Online Course Helps Practitioners Communicate Their Value, Ethics, and Expertise to Clients

By Greta Gloven

Advisors who want to demonstrate their advanced knowledge and certifications to clients now have an educational resource to help them—Exceptional Advisor™: Communicate Your Value & Build Client Engagement, an online course designed to help advisors differentiate themselves from other professionals in a highly competitive marketplace.

"Exceptional advisors have earned the necessary certifications to be competent providing sophisticated investment and wealth management advice to better serve their clients, but they don't always articulate the value of their credentials," said Sean Walters, CAE, chief executive officer of the Investments & Wealth Institute.

Based on Investments & Wealth Client Research 2017, a research study conducted by AbsoluteEngagement.com in partnership with the Institute, "exceptional advisors" were identified as those professionals who understand what clients need and value, provide meaningful guidance, demonstrate advanced knowledge, and act ethically.[1] "These exceptional advisors regularly explain to clients why their certifications matter, which results in improved client loyalty, satisfaction, and willingness to refer new business," Walters said.



The Exceptional Advisor communications course helps advisors understand the traits of an "exceptional advisor" by exploring the importance clients place on advisor knowledge and educating advisors about how to best communicate their expertise and credentials more effectively. Throughout the five-module course, participants garner practical strategies and skills. The course culminates in the development of plans to help advisors survey their clients to better understand satisfaction and engagement levels, communicate the financial guidance provided to their clients, convey the ethical standards to which advisors are bound, and create plans to share information about an advisor's credentials and competencies earned through certification.

The Exceptional Advisor course is currently open for registration. Fees are $195 for Institute members and $395 for nonmembers (Join & Learn price includes one-year membership in the Institute). The course provides five hours of continuing education (CE) credit for Certified Investment Management Analyst® (CIMA®), Certified Private Wealth Advisor® (CPWA®), and Retirement Management Advisor℠ (RMA℠) certificants and four hours of CE for CFP certificants.

The Exceptional Advisor communications course is one part of a larger Exceptional Advisor initiative to help advisors stand out among their peers and strengthen client relationships. The Exceptional Advisor Toolkit provides a variety of client- and advisor-focused resources to help advisors differentiate themselves. Access the toolkit at http://investmentsandwealth.org/exceptional-advisor-toolkit.

To learn more and register for the course, visit http://investmentsandwealth.org/ea.

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ENDNOTES

1. AbsoluteEngagement.com and Investments & Wealth Institute. Investments & Wealth Client Research 2017 (2017), http://investmentsandwealth.org/getmedia/b32fa3e4-664a-41e1-bbe7-a1ba17d696e7/17-Client-Engagement-updated.pdf.