FLPI
FINANCIAL LIFE PLANNING INSTITUTE
SOUTH AFRICA

Giving Financial Planners the tools they need to keep clients for life

Grow your client base

Build strong client relationships and keep clients for life

Create a sustainable and profitable practice

Differentiate yourself from competitors

"Clients today want and expect their financial planner to be more than simply a seller of products or an asset allocator. They can, after all, get these services elsewhere – without your help! This is where Financial Life Planning comes in.

"Successful financial planners realise that to be relevant in today's market they must start with life as the central focus and then move outwards to the services and products that fit the specific needs of each client. Financial Life Planning is a discovery process focused on asking the right questions and engaging your clients in meaningful conversations about important life events, transitions and goals. These dialogues are central to the Financial Life Planning process.

The FLPI will give you the tools to master these conversations and to truly understand your clients and their lives.

The more you understand your clients' stories and empathise with their challenges and opportunities, the more likely they will be to trust you with their hard-earned resources."

(Mitch Anthony: International Founder of the international FLPI)

The Financial Life Planning Institute (FLPI) helps financial planners and advisors create a profitable future for their business through the use of specialised Financial Life Planning tools and programmes.

By using the Financial Life Planning approach, you can:

- Grow your client base
- Build strong client relationships and keep clients for life
- Create a sustainable and profitable practice
- Differentiate yourself from competitors

The FLPI Offers Unique Financial Life Planning Tools

The South African FLPI operates under the auspices of the international Financial Life Planning Institute, founded by Mitch Anthony in 2003.

Financial planners pay a monthly retainer to access the FLPI's various tools for an unlimited number of clients. You can customise and brand all the FLPI's tools with your practice name and details.

You can sit with each client and go through the various tools together or, alternatively, your clients can go through the site's resources and tools at their leisure.

THE TOOLS ON OFFER INCLUDE:

A Client Discovery Tool

These are highly-developed, interactive questionnaires that will help you take clients through the Financial Life Planning process. They enable financial planners to take a more streamlined personalised approach in the discovery phase with both new and existing clients. This resource also enables you to identify, store, retrieve and update qualitative information focused on your client and their unique situation. Included in this tool are customisable client workbooks for over 100 life transitions and goals, e.g. retirement, change in career, birth of a child, buying a new house, etc.

Me2We Client Personality Profiling Tool

This interactive web-based programme is designed to help financial planners communicate more effectively with their clients by better understanding their client's unique personality profile.

New Retirementality Client Tool

This tool helps clients identify their life goals to receive a more fulfilling return on life. Based on Mitch Anthony's bestselling book, *The New Retirementality,* this retirement resource helps your clients plan their lives and dreams at any age.

To find out more about our programmes and tools, please contact us:

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Training done in conjunction with

Investment Wise