

How to Find New Clients Now!...with the Boomer Spike Coaching Group



Am I in the right place?

You are in the right place if:

- You're an advisor who wants to grow your retirement planning practice,
- By presenting educationally-focused Social Security workshops to Baby Boomers,
- Using the latest “best practice” techniques for virtual presentations.

Chris Holman, PCC

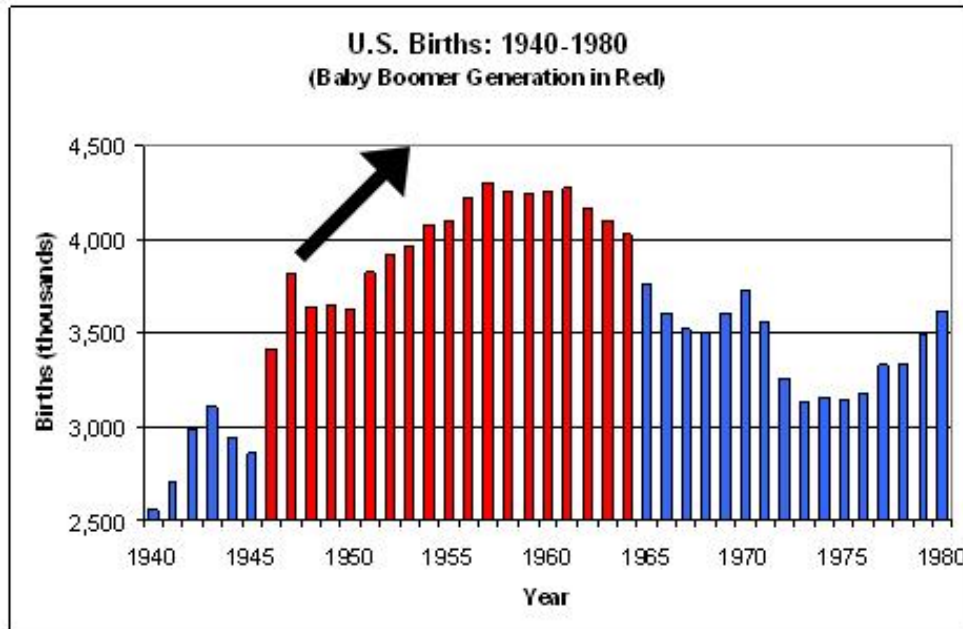


- ✓ Chris Holman has 39 years experience in financial services
- ✓ Built a successful career as a financial advisor
- ✓ Has coached/consulted with 2500+ advisors over the past 14 years
- ✓ Professional Certified Coach (PCC) credentialed with the International Coach Federation
- ✓ Trained and certified as a professional coach, with a special expertise in group coaching

Our Agenda Today



- What is the “Boomer Spike”?
- The Boomer Demographic (with Ron Surz)
- What is the Boomer Spike Coaching Group?
 - And how might it help you?
 - 5 specific outcomes
- Your questions

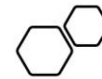


What is the Boomer Spike?

- 21% more retirees coming and they need advisors
- 36 million boomers in the retirement sweet spot of 62-70 for the next 10 years
- However....



Financial Education for Baby Boomers
with Ron Surz and Kathy Tarochione



The Baby Boomer Investing Show

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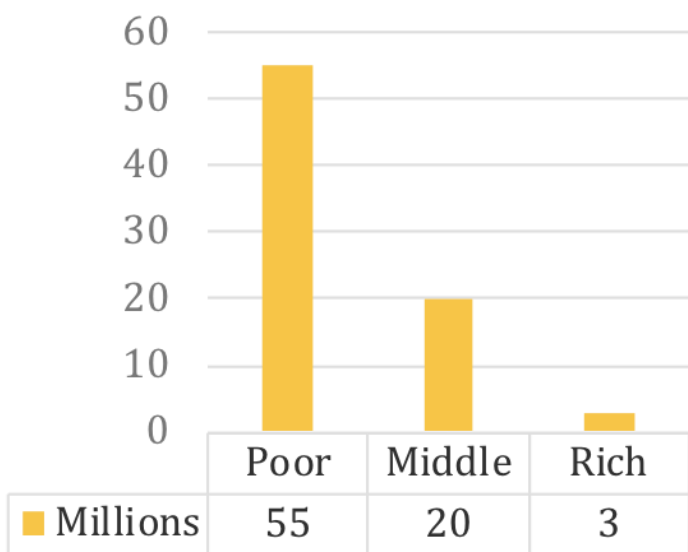
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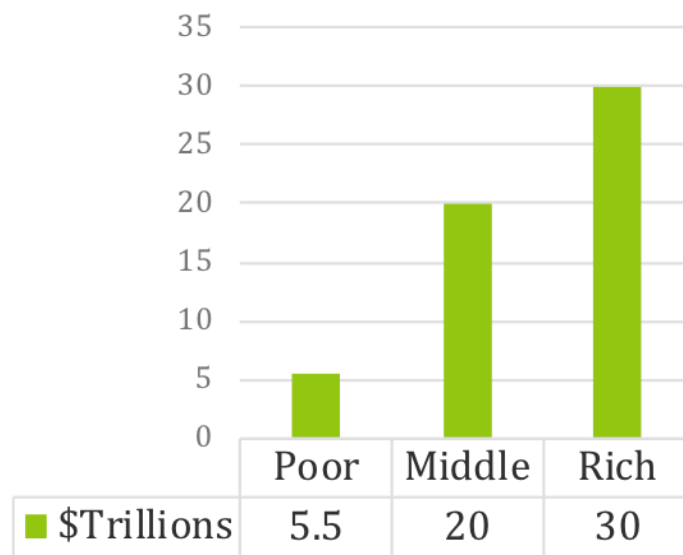
<https://m.youtube.com/channel/UCDnnLCOBtIYc5xRT0eqU-Vw>

Boomer Demographic

Millions of Baby Boomers



\$Trillions of Net Worth



Source: Target Date Solutions



Savings

3 Wealth Groups

Net Worth Percentile		Net Worth
10.0%		-\$962.66
20.0%		\$4,798.06
30.0%		\$18,753.84
40.0%		\$49,132.21
50.0%	Median	\$97,225.55
60.0%		\$169,550.64
70.0%		\$279,594.27
80.0%		\$499,263.50
90.0%		\$1,182,390.36
95.0%		\$2,377,985.22
99.0%		\$10,374,030.10

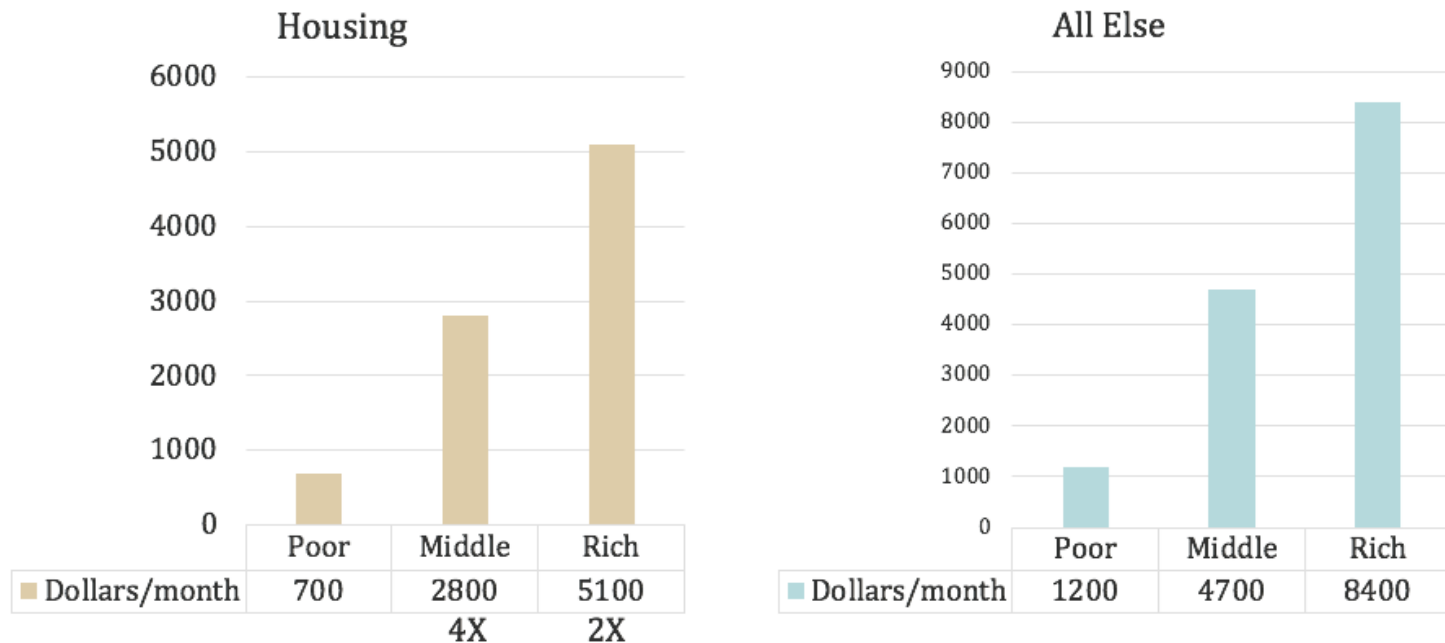
Poor

Middle

Rich

Source: DQYDJ

Spending Summary: The higher, the greater the threats



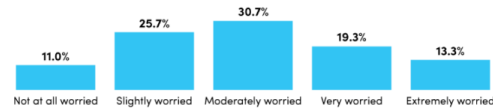
Source: Target Date Solutions

What impact is COVID-19 having on those nearing retirement?

We asked employed and recently laid-off employees* planning on retiring in the next 10 years to find out.

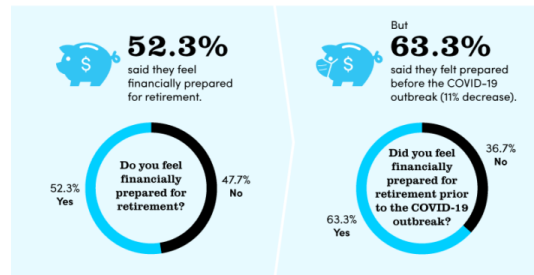
89% said they're worried about the financial impact COVID-19 will have on their retirement.

How worried are you about the impact COVID-19 could have on your retirement?



89% of pre-retirees are worried about impact on retirement

33% are "extremely" or "very" worried



People planning to rely on more sources of income in retirement (401(k), IRA, cash savings, Social Security, bonds, etc.) were 11% more likely to feel financially prepared for retirement.

Do you feel financially prepared for retirement?



40.4% of workers planning on retiring in the next 10 years said COVID-19's financial impact will delay their retirement plans.

49.1% said their retirement will look financially different because of COVID-19.

37.6% said they will not be able to live the retirement lifestyle they wanted because of COVID-19's financial impact.

Source: Personal Capital

*Laid off within the last three months

Source: Survey of 1,004 people

personal
CAPITAL

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New Study Shows Majority of Americans Fear Contracting COVID-19 More Than Facing a Recession

Pandemic drives 1 in 4 Americans to Seek the Help of a Financial Advisor for the First Time Ever; Uncertainty and Complexity Drive the Need for Greater Financial Protection

April 22, 2020

Columbus, OH - Even as the COVID-19 pandemic is upending the global economy, driving unprecedented market volatility and

News related questions?

Source: Nationwide Financial

Conclusions

- “Baby Boomers” are not a homogeneous group, financially or otherwise.
- 89% of re-retirees are worried about the how COVID-19 will affect their retirement.
- 1 in 4 are so concerned that they’re talking to an advisor for the first time.

What is the Boomer Spike Coaching Group?

(And how might it help you?)

- 5-10 financial advisors who are committed to finding new clients via (virtual) educational workshops on Social Security.
- Six months of full-on coaching: July-December
- 12 group conversations + private, one-to-one coaching (i.e. customized to you)

What is the Boomer Spike Coaching Group?

(And how might it help you?)



Coaching Programs

Boomer Spike Coaching Group: How to Do Social Security Workshops and Attract New Clients... Now!

You have the Social Security knowledge, and you want to present educational workshops for clients and prospects... now. Join this Horseshmouth coaching group and you can do your next virtual Social Security workshop in 45 days, or less

With Chris Holman, PCC, *Horseshmouth Executive Coach*

Virtual Coaching Group: July–December, 2020

[Learn More](#)

5 Outcomes from the Boomer Spike Coaching Group



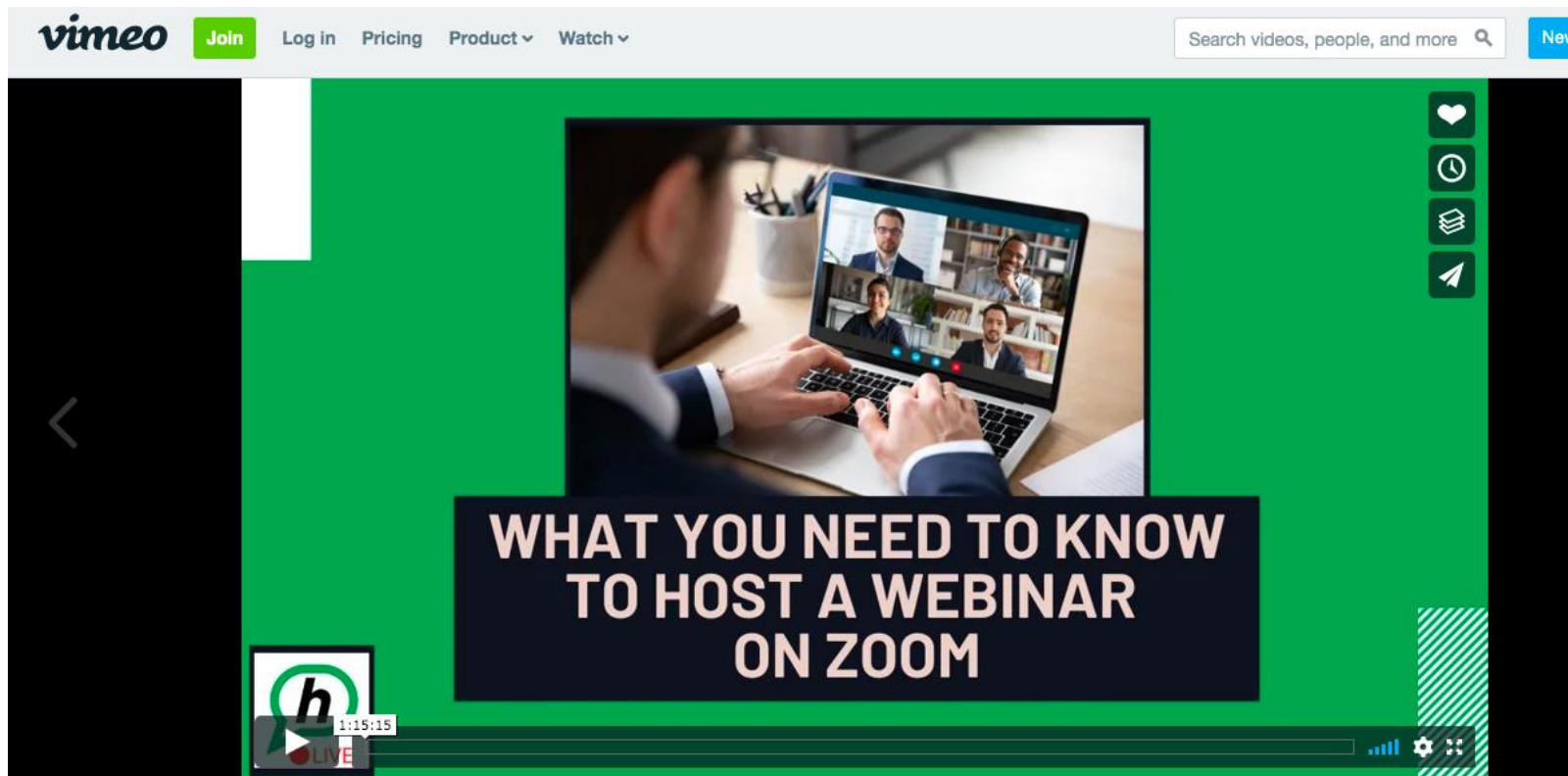
- You'll learn how to do virtual webinars.
- You will DO virtual webinars.
- You will share and collaborate...with like-minded advisors.
- You'll leverage the new virtual “sales cycle”.
- You will be accountable.

Horseshmouth: We know virtual...



Some recent HM articles from The Daily Oats:

- *Virtual Client Meetings: Tips for a Smoother Experience*
- *Virtual Prospecting: How I Connect With Clients and Prospects Without Leaving the House*
- *Is Virtual Selling Really That Different?*
- *Embracing Change: How to Get Started With Webinars—Even If You’re Not Tech-Savvy*
- *Keeping Clients Close During the Pandemic: 9 Tips on Engaging Audiences Virtually*
- *9 Tips for Keeping it Polished and Professional in Virtual Meetings*



What You Need to Know to Host a

More from Horsemouth

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Zoom Meeting Security: 5 Steps to Ensure You Don't Get Zoombombed

Apr 9, 2020 / By Devin Kropp
Horsemouth Associate Editor

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Are you doing virtual client meetings or webinars? Make sure you have locked down your Zoom account to protect your meeting from the intrusive hackers who are “Zoombombing.”

Dissertation defenses, religious services, educational workshops and more have all gone virtual as half the world's population practices social distancing. But as these events move to the popular online streaming service Zoom, hackers have taken advantage of the software's open security settings. A phenomenon now being called “Zoombombing” has unfortunately led to some online meetings being disrupted.



Collaboration and Partnership: What advisors are saying



- *“In just one month of participation in the Savvy Tax Group, I’ve learned valuable tips and best practices around topics like virtual meetings & marketing, tax planning software and more. Chris Holman’s one-on-one coaching also helps me to be accountable for implementing ideas that can help me grow my business.”*
- *“I enjoy learning what makes other advisors successful. The ideas that are shared throughout the group help motivate me to evolve my practice and provide a higher level of service. Many of the improvements that I am making to my practice have come from ideas from other advisors in the Horseshmouth coaching group!”*
- *“I value the collaborative nature of the Horseshmouth coaching group. The environment that is created allows for an open dialogue with my peers regarding best practice ideas that I can apply to my own practice.”*

Embracing the New Normal: Why Advisors Need Virtual Communication Now

May 6, 2020 / By Tony LaJeunesse

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4 New clients
\$3 million AUM
All virtual!

What's Working Now: This advisor shares how he has transitioned his financial education strategy online—and how webinars have brought in several new clients since March.

Editor's note: *In this edition of What's Working Now, an AdvisorRADIO feature in which Horseshmouth members tell us about recent success they have had running and growing their businesses, we hear from Tony LaJeunesse, who has successfully transitioned to webinars for clients and prospects.*



The following article includes edited excerpts of this conversation, or you can listen to the full interview below.

Here's my part of the Accountability Partnership:

- At the beginning of our coaching engagement, I will ask you, *“By the time that we're done in December...what are 1-3 goals that you commit to achieving?”*
- At the end of every group conversation, I will ask you something like, *“Between now and the next time we speak, what is one thing that you'd like to achieve?”*
- At the beginning of every group conversation, I will ask you, *“Since our last group conversation, what have you been able to accomplish?”*
 - *And what remains?*



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Item	Description	Qty	Price	Dsc	Net	Total	
Boomer Spike Coaching Group	6 months of coaching (12 sessions) including 6 group coaching sessions and 6 one-to-ones sessions. Payment Options Single payment ▼	1	2997.00	200.00	2797.00	\$2,797.00	X
Savvy Social Security Planning for Boomers	Your Savvy Social Security Planning for Boomers program includes: 6 Client Presentations, 7 Calculators, The FA's Guide to Savvy Social Security Planning, Savvy Social Security Client Reference, 135 Social Security Questions Answered, Subscribers-Only Website, Marketing Toolkit, Social Security Audit Tool, 12 Article Reprints and The Happy Advisor.	1	597.00	100.00	497.00	\$497.00	X
		Update			Sub-total	3,294.00	
					Shipping	23.85	
					Adjustments	0.00	
					Taxes	0.00	
					Total	\$3,317.85	

Next steps?

- Let's talk
 - 212-217-1132
 - cholman@horsesmouth.com
 - <https://calendly.com/cholman-hm>

Questions?

