

Helping You Succeed

Mutual Funds Sales Training: Part 1

Welcome!



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Agenda – Part 1

- Prospecting & Pivoting
- Explaining Investing Basics
- Planning the Conversation

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Prospecting & Pivoting

- Identify prospects for saving and investing conversations
- Use word tracks to pivot to saving and investing conversations
- Overcome client objections and ask for the appointment

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Explaining Investing Basics

- Explain the benefits and risks of investing
- Use the Morningstar Charts in explaining investing concepts and terms
- Briefly explain types of mutual funds and investment accounts

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Planning the Conversation

- Determine how you conduct a saving and investing conversation, including when you:
 - Discuss client dreams and needs.
 - Talk about products.
 - Discuss fees.

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Conclusion

- Establish and write down goals:
 - Prospecting
 - Setting appointments
- Choose an accountability partner
- Achieve your goals before Part 2

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