

Virtual coaching in personal estate and business succession planning

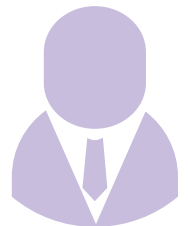
“real has a tried and tested process that you can adapt to your own practice needs and a virtual coaching program that provides practical advice and support.” **TIM DENT – FINANCIAL ADVISER**

real services provide a unique personal estate and business succession coaching service for advisers wanting to enhance their client offering.

Using web based meeting technology our experienced educators and facilitators provide one on one coaching sessions on a range of topics in a very practical and convenient way.

Sessions generally run for 60 minutes and are recorded and sent to you for future reference. Our virtual coaching sessions can be tailored to meet your specific needs and many people who attend our one day workshops find these sessions very useful to drill down into specific areas.

Our practice assessment allows us to find out more about you and helps identify what coaching needs you may have. We offer this assessment as part of our complimentary discovery session in which we review the results from the assessment and overview what coaching programs we recommend for your practice.



A sample of some of the sessions offered in our virtual coaching program

How to implement the 7 step facilitation process into your practice

Working through live client case studies

Developing your value proposition and pricing that value

Conversation skills – asking the right questions to facilitate the process

Committing your clients to action – preparing and presenting the issues

Facilitating other professionals effectively and efficiently

Better engagement of clients and centres of influence

Technical sessions around legal and funding issues

Marketing programs and lead generation

Our virtual coaching programs can be one offs or bundled to include a number of sessions. Some of the sessions may also include access to our tools and templates which will be discussed during our complimentary discovery session.

SERVICE GUARANTEE

real services provide a service guarantee on all of its virtual coaching programs which is a commitment to refund any fees if the program does not meet your expectations

If you want to get real about estate and succession planning contact us

T 1300 613 965
E info@realservices.com.au
W www.realservices.com.au

