



June 2021 Edition #23

CUSO TRAINING & COACHING UPDATES 2021

Wonderful World of Coaching, Training & Knowledge Expansion!

We are excited to share that CUSO will have some new coaching and training options coming down the pipe shortly to help you continue expanding your knowledge and getting better at what you do!

There are a few different options and CUSO is working to ensure they are aligned with the needs of their various CUSO advisors.

It's important we keep in mind that the PSA Program is focused on the CUSO fundamentals and understand the value **of continued coaching** on a variety of other topics.

To learn more about the importance and impact of coaching, watch this quick 3-minute TED Talk: <https://youtu.be/fCsGxPQw1s>



PSA Progress Updates as of June 2021

Kootenay Savings Credit Union (KSCU) PSA Training is getting set to finish **Pillar 3: Client Onboarding** in June and is headed into the home stretch of the PSA Program this summer.

Revelstoke Credit Union (RCU) PSA Training is getting set to have their one-on-one sessions in June and is almost finished **Pillar 2: Client Experience**.

We are also working with the **PSA MFIS Group** to get them PSA Certified!

ANNUAL CLIENT EXPERIENCE RECOGNITION

All those who participated in the ACE Process will get an individual touch base in June to see how things are progressing as we reach the half-way point of 2021.

All newly PSA Certified Financial Planners in 2020 will be participating in their **first annual ACE Recognition** this fall, which includes Christian Credit Union.

In addition, all **PSA Certified Associates & MFIS** who are actively servicing their own clients will be participating in the ACE Process for the first time. Shortly, you will receive additional information about how to begin preparing for the ACE Process to make it easier on you this fall. Some of you have been highly involved with PSA Training up to now while others have not been, which may mean there is a little more work to do to get on track. Either way, we will provide a solid path for you to run on with ACE and look forward to helping you benchmark your progress over time, just as we do for the Financial Planners.

CANADA DAY CELEBRATION!

This Canada Day marks a very special time – one where we can see the light at the end of the tunnel as it relates to the pandemic and how it has impacted all of us for over a year.

You may want to do something extra special to mark this occasion for your top clients. Consider sending a beautiful Lavish Card with a heart-felt handwritten greeting inside to your very best clients. For the other clients, simply comprise an email template wishing them and their families a wonderful Canada Day. You may want to do something extra and include an article on the best way to celebrate Canada Day in your region or a favorite summer recipe – ideally one you have tried and can provide a glowing endorsement for!



If you are speaking with top clients before or after Canada Day, be sure to ask them how they were planning to celebrate or how they in fact did celebrate. It will be loaded with FORM information that will help you connect with and build even more trust with them.

COMING SOON: Thanksgiving

CUSO will be reaching out to you in July to help you get organized for the Lavish Cards you will need for **Thanksgiving 2021**. Yes, we are serious – it will be here before you know it!

With card orders assembled in July, placed in August, arriving in September – we need to keep pace so we aren't stressing out the week before Thanksgiving (or worse yet, suffering from sever hand-cramps).

Start reviewing your client list now to see how many you will need this year.



QUESTIONS FROM THE FIELD

“How often should you update a client’s Financial Plan?”

Think of Financial Planning much like you would a check up from your Doctor or Dentist. Sometimes we are so busy with ‘life’ that it is difficult to make time for seeing these professionals, but there is a sense of relief once you have the appointment because they have either given you a clean bill of health or made some recommendations on how to improve it. Either one is necessary to keep you on the best path as it relates to your health. When in poor health, we are not at our best.

In this regard, it is also recommended that **Financial Plans** are updated **annually** or **sooner if there has been a significant life event**. Financial Planning is an integral part of the value-add provided to investors who otherwise can get low-cost almost no-cost investment advice online. When our clients feel their wealth has not been reviewed or checked, they are not experiencing the financial peace of mind we know they seek. Be sure to review your top clients as you hit mid-year to make sure you are on track for keeping all of the Financial Plans up-to-date and current – and make updates to Maximizer accordingly.



ACTION PLANS GALORE!

For those of you looking for continued Maximizer Integration to make your life easier, I encourage you to explore some of the many pre-written Action Plans provided by Maximizer Wealth.

All of these are prefixed with a number – which is easily distinguishable from those custom created by CUSO which are prefixed with a *.

These **pre-made Action Plans** are especially helpful when it comes to the multiple follow up and steps related to account administration. They include things like:

- Address Change
- KYC Updates
- Client Account Opening
- Recurring Activities such as PAC, SIP, SWP
- Mortgage Process

There are also **Action Plans** designed to help the Advisors related to:

- Financial Planning
- Tax Planning
- Estate Planning
- Portfolio Recommendations

If you have a routine process that would be helpful to add as an Action Plan in Maximizer, please let us know so we can build it for everyone to use!

SUMMER READING

There are many great books out there but for those of you planning to spend some quiet time outside reading this summer, here are a few of my recommendations:

- The GO-Giver by Bob Burg and John David Mann
- The E-Myth Financial Advisor by Michael E. Gerber
- The Speed of Trust by Stephen M.R. Covey
- It's All About them – How Trusted Advisors Listen for Success by Bill Bachrach & Steve Shapiro
- FISH! by Stephen C. Lundin, Harry Paul, and John Christensen
- Good to Great by Jim Collins

WELCOME JUNE!

I hope each of you has time set aside this summer for holidays and personal time off with your families. It's important to have an opportunity to rest and recharge!

With the path to recovery from the pandemic in front of us, it is more than likely that this Fall will be Business as Usual which for some is going to bring an onslaught of catching up and clients wanting to come in and see you.

Get ready for a busy back-half of 2021!

