



June 2020 Edition #12 – *Our 1 Year Anniversary Edition*

## PSA UPDATES

The **MFIS PSA Training** has just begun their final month of training and will begin PSA Certification in July 2020. The second round of MFIS PSA Training is set to begin in September 2020.

The **Christian Credit Union** team is on track to be fully PSA Certified in June/July.

## ACE SUMMARY & ACTION PLANS

As mentioned in the last edition, we did not forge ahead with active follow up on the ACE Summaries due to the current circumstances. As we approach the half way mark for 2020, we will be sending a follow up in **June** so that as things begin to 'normalize' you can focus on the things most important to you, your team and your clients.

## PARTNER PORTAL UPDATES

The Partner Portal found on [www.cuwealth.ca](http://www.cuwealth.ca) is under renovation as we try to maximize value and ease of use for you in this area. Right now, you will find both of the **PSA Programs**, the **CUSO Maximizer Training Programs**, the **Advanced Coaching Webinars**, **PFO Additions**, previous editions of the **Coaches Corner** and a list of **Key Contacts**. We continue to work on other areas of this page and welcome your suggestions!

We are also very excited to inform you we are building out a comprehensive process for **onboarding and servicing Insurance Only Clients**, which will be added to the Partner Portal in June!


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[Our Approach](#)
[Our Team](#)
[Strategic Partners](#)
[Benefits of Ownership](#)
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# PARTNER PORTAL

FOR INTERNAL USE ONLY



## PROVEN STRATEGIES ADVANTAGE PROGRAM

- [PSA for Financial Planning Teams](#)
- [PSA for MFIS](#)



## TRAINING

## MORE COACHING RESOURCES



[Advanced Coaching](#)



[COACH'S CORNER](#)



[PFO Additions](#)

## KEY CONTACTS

- [The CUSO Fulfilment Centre](#)
- [Wealth Teams Contact & Information List](#)

## OTHER

[The CUSO Playbook](#)

[The EPIC CUSO Library](#)

## QUESTIONS FROM THE FIELD



*“We are conducting more of our client meetings either virtually or over the telephone – do you have any resources to assist us in being organized with these approaches so they can be as effective as possible?”*

First of all, we are **delighted** to see so many advisors carrying on with client and prospect meetings by adapting to **new ways of meeting delivery** – it’s awesome! So many advisors are actually really enjoying the virtual meetings as are their clients! So many have commented that because their older clients have been Facetiming and Zooming with their families to stay in touch, they are willing and eager to embrace this new technology like **never before**. Don’t be surprised if some of your older clients are more tech-savvy than you : ) Many see it as the new norm for clients who are geographically or health challenged – or simply because the clients love the convenience of it! It’s a **necessary evolution** to thrive not only through the pandemic but going forward in general.

As a result, we have created two new resources to help advisory teams be fully organized and prepared for these two alternate modes of meeting:

- [Review Meeting Checklist Virtual](#) – This contains a helpful technical checklist on page 3
- [Review Meeting Checklist Telephone](#)

There have also been many presentations recently on how to conduct virtual meetings which are professional and effective. This includes everything from type of software to use, the right webcam to buy, the lighting necessary, and general pointers on effective 'virtual' communication. I encourage you to google or YouTube these when you have a minute.

## ADVANCED COACHING SESSIONS

Okay, for REAL this call will happen in June! Yes, it has been bumped a few times over the past few months to make space for high priority topics to assist advisory teams and I hope you have attended and taken away as much value from those calls as possible.

<b>Topic:</b>	<b>Introduction Process – the Reboot!</b>
<b>Date:</b>	<b>Wednesday, June 17<sup>th</sup></b>
<b>Time:</b>	1:05 pm Pacific Time
<b>Dial &amp; Log In Details:</b>	Go To Meeting details provided by Danielle
<b>Best Suited to Attend:</b>	All CUSO individuals (Financial Planners, MFIS, Assistants)

This topic is something I recommend everyone attend. A reminder that if you cannot attend, all Advanced Coaching Sessions are available on the website now.



One of the recent speakers at BERT, Alexandra Williams, talked about the importance of capturing everything as it relates to client communication as soon as it happens to ensure you have full, complete and accurate records in the event of a client complaint or litigation. The CUSO team is so fortunate to have the ability to fully integrate Maximizer to capture **every aspect of their Client Relationship**. Just a brief reminder to:

- Use the CUSO Created **Action Plans** to manage bringing on new clients, as well as the ongoing service of them.
- Use the CUSO **Tabs & Fields** to capture and track all information related to Financial Planning, PFOs, FORM and Moments of Truth.
- Be sure to **upload** documents, files, letters, emails and financial plans to the household records to have a comprehensive depository for each client.

I've worked with a handful of advisors who've gone through the horrific process of dealing with a client complaint and/or litigation – and let me tell you, its time-consuming and extremely stressful even when you DO have records and everything turns out in your favour. Like everything else in the PSA, be proactive and be prepared.

**Have an amazing, sunny & beautiful month of June : )**