Presentations by Evan Beach

1. Retain and Gain: An evidence-based client communication schedule to maximize referrals and retention

- *Type of Presentation: Breakout session or Webinar*
- *Audience: Financial professionals*
- *Platform: Virtual or Live*
- *Time: 1 hour*
- *CE Eligible: Yes*

In this presentation, Evan will guide financial planners through an evidence-based client communication cadence based on academic research. This presentation will cover how frequently you should discuss investments, planning, and clients' hobbies, to maximize referrals and retention. He'll cover everything you need to know about how to create a better communication schedule with your clients.

2. What Clients (Actually) Value Most in A Financial Advisor

- *Type of Presentation:* Keynote or Breakout session
- *Audience:* Financial professionals
- *Platform:* Virtual or Live
- *Time:* 1 hour
- CE Eligible: Yes

Based on Morningstar research and his subsequent Kitces blog post, Evan dives into what clients actually value in an advisor. From there, he will show you how to apply this to your sales and service process to maximize growth and retention. Evan's blog post has been featured on the Kitces all-time "best of" list.

3. Using "Influence" Techniques to Turn Prospects into Clients

- *Type of Presentation:* Keynote or Breakout session
- *Audience:* Financial professionals
- *Platform:* Virtual or Live
- *Time:* 1 hour
- CE Eligible: Yes

Based on Robert Cialdini's best-seller, "Influence," this presentation is all about using persuasion strategies to help prospects convert to clients. Evan will reveal his playbook of how he used these strategies to more than triple the AUM of his former firm. He will cover everything you need to know about how to turn your prospects into clients.

4. Maximize What You Keep: Tax Planning for Retirees

- *Type of Presentation:* Workshop, Breakout session, or Webinar
- *Audience:* Clients and US employees
- *Platform:* Virtual or Live
- *Time:* 1 hour
- CE Eligible: No

Every financial move you make in retirement shows up on your tax return. In this session, Evan will show you how to minimize your lifetime tax bill. This includes how to approach major financial transitions, including retirement, relocation, divorce, and death. Don't miss how to maximize your income and minimize your taxes.