

FINANCIAL ADVISOR EDU.COACHING™



HOW WE WORK

Resources
Advising
Skills
Tools

Where financial advisors get result\$!



Our 6-Step Process

Phase 1: Exploratory Session

New relationships begin with a qualification session to align your requirements, goals, abilities, and budget with our strengths, services, and fees. To schedule a session, complete our [Exploratory Session Form](#). Upon receiving your form, we'll send back a Coachability Index, along with a quick Business Strengths Inventory for you to complete. You'll also receive a call to schedule a complimentary 20-30 minute session by Skype, phone, or in person, to assure you that we're a "good match."

Phase 2: Scope Determination

We'll establish the scope of our work together, including the services, products, and tools that will be most helpful to your situation. Then we'll develop a structure and time frame for our engagement and tweak a program specifically to meet your needs.

Phase 3: Supportive Investment

Consistent reinforcement, accountability, and new level of discipline are important as you move toward higher levels of success. Support meetings can take place in person, using Skype, phone, teleconference, or webinars. We can meet with you daily, weekly, bi-monthly, monthly, quarterly, semi-annual, or annually.

Your investment, including materials and program information, will be spelled out initially in a Proposal and finalized in our Customer Agreement along with other information.

Rates vary from a minimum of \$350, to day rates between \$4,000-\$10,000, and speaking engagements starting at \$7,500. Inaction often costs much, much more. Planning and investing in your future is not only smart, they are one of the most impactful things you can do.

Phase 4: Goal Setting

The fun starts! As we begin our work you'll complete an in-depth series of professional and personal assessments to gain a bird's eye view of where you are, and a long term look at where you want to be. During the first support session we will discuss the results along with your insights, and create an Action Plan for our next session. We'll add you to our automated system to receive a weekly "Success Tracker" and monthly Schedule Session Reminder. You'll also gain access to the Client Cafe and other systems as previously outlined in the Customer Agreement.

BUSINESS EDUCACHING™

EduCoaching™ is our proprietary blend of coaching, consulting, advising, and education. Using strategies tailored to today's environment, my clients make a deliberate shift to a new level of growth. Simple business and action plans processes give structure and clarity to busy professionals. With an unbiased and objective viewpoint, we challenge clients to improve service, control costs, and distinguish themselves in a competitive marketplace.



Where financial advisors get result\$!

SPEAKER/TRAINER

Maria speaks at professional conferences and conduct private company workshops or retreats. Popular topics include: Business Planning Made Easy, Attracting Higher-End Clients, Network for Success, LinkedIn® Demystified, and Pricing & Raising Rates. Bring us to your next company or conference visit: www.ActNowSeminars.com

TURN YOUR KNOWLEDGE INTO CASH

With unique expertise in the business world, we help clients create multiple streams of income. Maria has written nearly 500 articles, many of which have been turned into workshops, CDs, webinars and more. We've also been quoted in high profile magazines such as Entrepreneur, Money, Forbes Women, and the Bottom Line.



Phase 5: Success Preparation

Next we'll address any crisis that is causing you financial risk, frustration, or pain. You'll gain support in reaching your short and long term goals with a simple and effective business planning process. This includes taking a closer look at your Ideal Client Profile and marketing efforts.

Even good changes can lead to feelings of excitement, anxiety, and rebellion. Some situations may be easier for you to process than others. To prevent paralysis, we ask that you talk about and walk through anything you're experiencing at our sessions.

Phase 6: Celebrate Closure

We encourage customers to acknowledge and celebrate reaching their goals along our journey together. Prior to the last session of our contract you'll complete a short Impact Form to review our work together, and how it has impacted your business and life.

We will also dedicate a session to Celebrate Closure. The time spent on closure varies; it could include a focused conversation, dinner, or retreat weekend, etc. At this session we'll have a conversation to celebrate your triumphs, review Lessons Learned, update your business plan, or look at your future.

"Closure does not mean that we can't continue to work together. It simply affirms that we've completed the work "Determine Scope" in Phase 2. We'll say goodbye to what was and hello to the next chapter -- and whatever new possibilities may be." — Maria Marsala



Where financial advisors get result\$!

Resources

Advising

Skills

Tools

Call Us Today!

Contact Maria today for a session and let us demonstrate how our expertise in business growth can save you time and benefit your business in other ways. Our clients include seasoned business owners as well as newer advisors aspiring to be millionaires.



Where financial advisors get result\$!

Elevating Your Business

**19906 Hamilton CT NE Suite A
Poulsbo, WA 98370**

Phone: 425.440.9659

Web: www.ElevatingYourBusiness.com.

Email: www.CoachMaria.com/ticket/