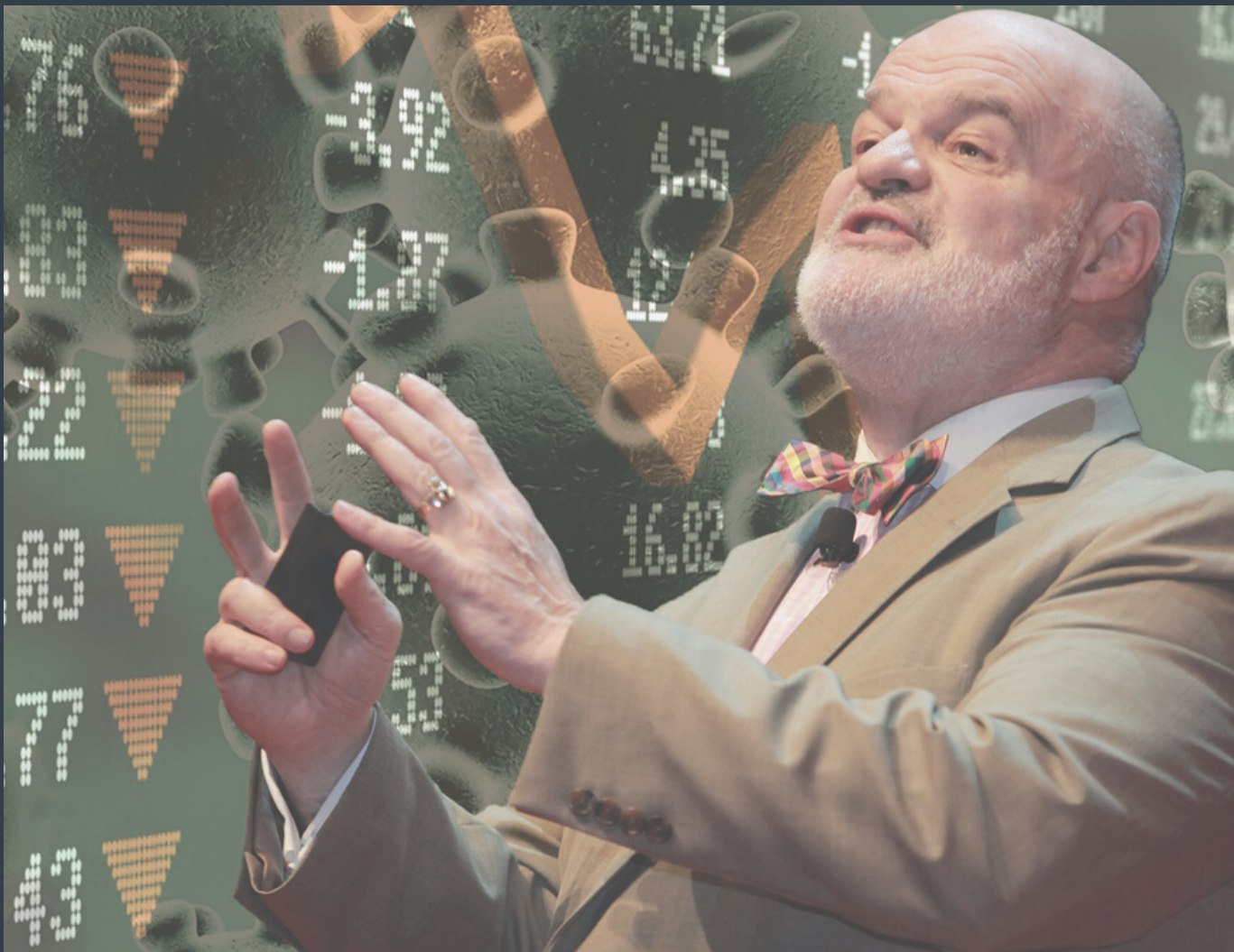


# Prospering In A Post-COVID World

Joe Jordan Conference Call  
or Virtual Presentation II



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## Prospering In A Post-COVID World - Webinar

First, it is my hope that you and your staff are all healthy and safe. COVID-19 has forced all of us to work differently, including myself. I'd like to propose a solution that fits into your existing virtual situation to inspire advisors and provide them with up-to-date, actionable ideas.

Faced with volatile markets, government ordered quarantines, and fearful clients, this is your advisors' best opportunity to proactively reach out to clients and new prospects, build trust and relationships, and deliver extraordinary value. In this virtual presentation or conference call, my goal is to take the business from the head to the heart. I will inspire your advisors to make their calls, generate referrals, and add value to their client relationships.

**Length:** 30 - 45 minutes

**Format:** Phone call or online presentation

### TOPIC OUTLINE

#### RIGHT MINDSET DEALING WITH COVID

- Is this happening to you or for you?
- Use the disruption of the virus to adopt new venues and technologies to become more efficient in the future.
- Adoption is the new innovation.

#### POWER OF GRATITUDE

- To maintain that positive attitude.
- Establish gratitude Fridays.

#### OUR PRODUCTS AND SERVICES WERE MADE FOR MARKETS LIKE THIS

- Clients need a plan, clients need a partner.
- A well-timed intervention can be worth a decade worth of fees.
- Simple 5 minute explanation of capital markets.
- Importance of managing client behaviors and emotions.

#### CLIENT CENTRICITY - FOUR PILLARS OF LIVING A SIGNIFICANT LIFE

- BELONGING - the need for human contact.
- PURPOSE - requires a commitment greater than what is in it for you.
- STORYTELLING - all wisdom comes from specific human experiences. Provides access to six months (two per month) of financial planning stories via email.
- TRANSCENDENCE - out of body experience when you help others.

## TOPIC OUTLINE (Continued)

### BUILT ON 2 FOUNDATIONS - PROSPECTING AND EVERYTHING ELSE

- Prospecting tips and tools.

### THE 6 RETIREMENT RISKS

- A) LONGEVITY - LIVING TOO LONG  
Maximize Social Security by delaying (unique explanation) plus explanation of mortality credits and possible use of immediate annuities to support fixed expenses and provide lifetime income.
- B) MARKET AND INTEREST RATE RISK/VOLATILITY  
They go up and down!
- C) WITHDRAWAL RATE RISK  
Eye opening discussion on how much one must set aside to provide additional income. Clients don't know how to turn assets to income.
- D) SEQUENCE OF RETURN RISK .  
Simple to follow explanation of this risk and how losses in early years of retirement can be especially damaging.
- E) PURCHASING POWER RISK  
Simple non-analytic easy to follow explanation of loss of purchasing power Using postage stamps and S&P from 1990 to 2020 (30 year retirement horizon tied to life expectancy of non smoking couples).
- F) HEALTH RISKS  
The odds of needing LTC.

### END WITH STORYTELLING

- Where I tell my story, makes it personal.