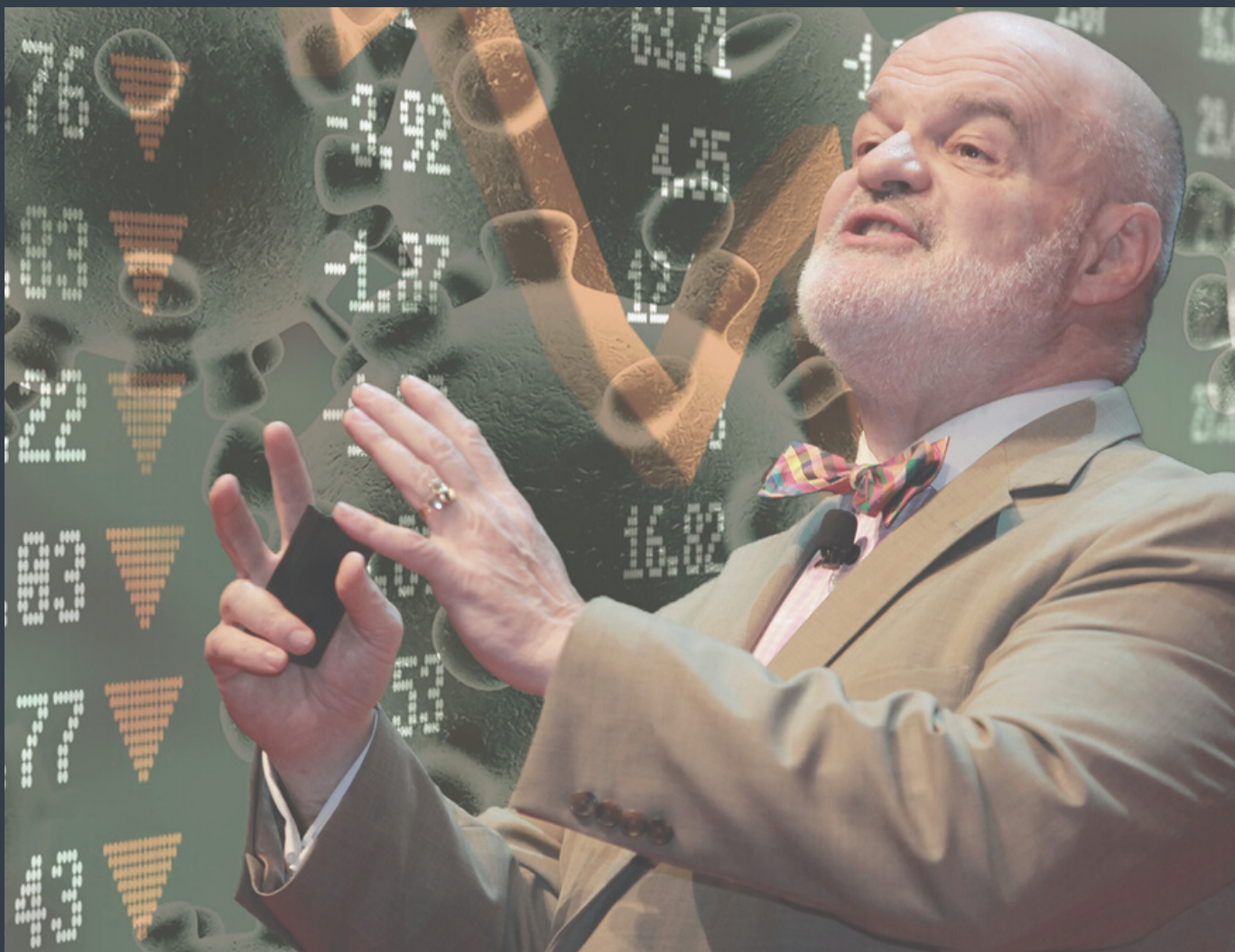


Prospering In A Post-COVID World

Joe Jordan In-Person
or Virtual Presentation IV



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Prospering In A Post-COVID World

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 situation to inspire advisors and provide them with up-to-date, actionable ideas.

Faced with volatile markets, capricious government policies, 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 in-person or virtual presentation, 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: 30-60 minutes

Format: In-person or virtual presentation

TOPIC OUTLINE

RIGHT MINDSET DEALING WITH COVID AND ITS AFTERMATH

- 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. The importance of having a buffer asset to minimize the damage to the portfolio during market downturns.
- E) PURCHASING POWER RISK
Simple non-analytic easy to follow explanation of loss of purchasing power Using postage stamps and S&P from 1991 to 2021 (30 year retirement horizon tied to life expectancy of non smoking couples). The rising costs of Medicare premiums and IRMAA (Income-Related Monthly Adjustment Amount), and their impact on Social Security benefits.
- F) HEALTH RISKS
The odds of having a chronic adverse health condition in retirement.

END WITH STORYTELLING

- Where I tell my story, makes it personal.