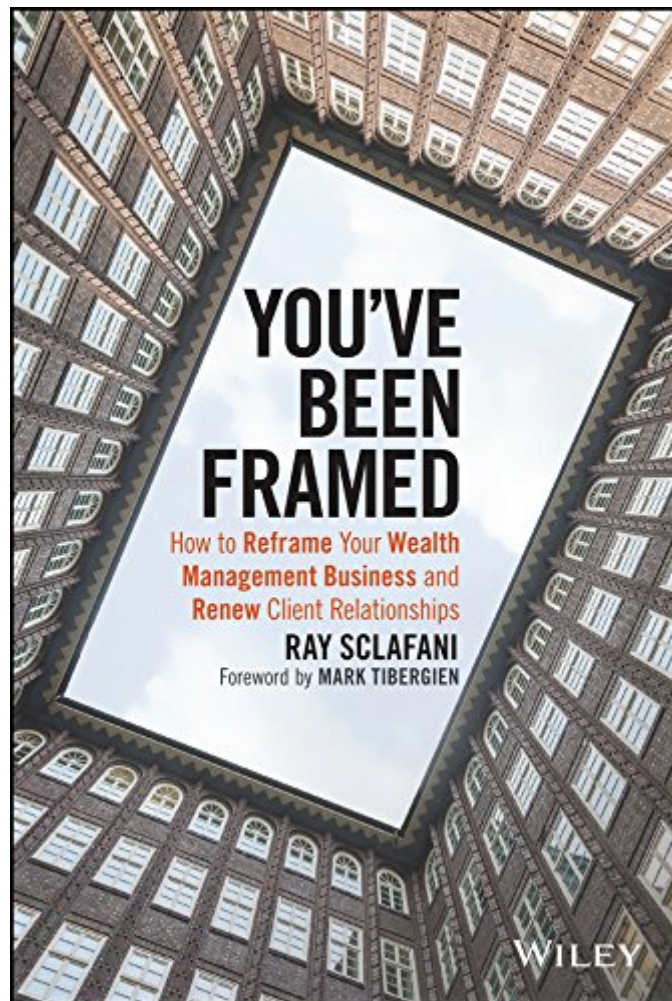


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You've Been Framed: How To Reframe Your Wealth Management Business And Renew Client Relationships



Synopsis

Reframe "wealth management" to achieve sustainable success in financial services You've Been Framed is a step-by-step guide for achieving ultimate profitability and sustainability for your financial advisory firm. Whether you're a savvy entrepreneur ready to dominate your competitors, or a more experienced advisor moving toward selling your practice, this guide will help you proactively reframe your business. You'll learn how to grow your pipeline of prospects, win the next generation of clients, and deepen your business so it can thrive without you, leaving you free to pursue what matters to you. Build your business on a holistic foundation of wealth management and assemble the team that will take you to the top as you develop a whole new perspective from which to offer your services. Transform your role from "directive advisor" to "trusted advocate." Completely shift the paradigm, and make yourself the de facto solution to your clients' wealth management issues. Whether it's the firm with which you're affiliated or the types of products and services you offer, you've been "framed." As a wealth management advisor, your clients have little understanding of what you do or why you do it. Even your team may have the wrong idea. This book helps you clarify and demonstrate the value of your knowledge and skills, so you can frame your work on your own terms. Build and showcase your enterprise value Renew client relationships and attract new demographics Become a leader with proven team-building tools Shift your role from advisor to advocate If you haven't effectively led discussions to co-create what your business stands for and what differentiates it from competitors, you're losing talent, prospects, and business. You've Been Framed gives you the perspective you need to thrive in the new financial environment, and achieve sustainable success.

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Customer Reviews

As a 4 decade veteran of the Financial Services Industry, I knew that I needed a paradigm shift. You've Been Framed shatters the old mindset of the "brokerage" industry and re-frames what it means to be a Wealth Management "Advisor" in the 21st century. Whether you are a long tenured veteran or a new advisor, you're sure to walk away from You've Been Framed with a different perspective and a greater understanding of your role in the industry and especially in the lives of your clients.

YBF is the perfect book for this changing financial landscape. The advisors that reframe are going to be the most successful out there in the business. I HIGHLY recommend this book for any financial advisor that wants to build their business!

I am one of the executive coaches who has worked with Ray Sclafani over the past 7 years in his financial advisor coaching practice. Ray is a masterful speaker, facilitator and coach, and now he has succinctly built on his years of research, experience, and knowledge creating an easy to read, accessible set of highly practical information for everyone in the industry to benefit from. If you are an advisor who isn't getting the results you want, are not sure how best to market, are struggling with whether to grow your team, how best to lead them or how to build and leverage your best customer relationships - there is something in this book for you. "You've Been Framed" offers fresh, relevant content (even for the many advisors who have heard Ray on the podium), beyond any other practice management book out there for financial advisors. The book is chock full and an executive summary of this book will not suffice. The value you will find between these two covers goes way beyond the list price of the book.

This is a must read for for any financial advisor who would like to become the best of the best. Ray

provides a clear road map to transform your practice and take you to the next level of professionalism. Distinguish your team by re-framing your image, vision and message. Read "You've Been Framed" now.

This book is specifically intended for financial services professionals. The author believes that providers of financial services are in a noble profession. They provide a vast array of services to their clients. They also provide for their client's well-being. If you have chosen financial services as your career, make it a great one. Sclafani provides the mind set and tactics to build a 1st class wealth management practice. How to build a team if you are a "Lone Ranger advisor", how to grow a team and practice, and how to transition a team practice with a succession plan. Fact based. Well researched. Focused.

Our team has read this book and have benefited so much from its content. Sclafani gives practical ideas for managing client's perception of the value you bring and elevates them from customer to advocate. Also helps your team learn how to position you and your firm in the marketplace. Invaluable content for any advisor looking to grow their business. Would highly recommend!

You've Been Framed is the culmination of Ray Sclafani's 20 plus years of observing, researching and coaching Financial Professionals. It is an insightful, thoughtful and serious effort that is also easy to read and structured to be consumed in bite sized time blocks. Ray is a master of his subject, and knows how to deliver his message in an engaging manner that resonates with the Advisor looking to go from being Framed to building and controlling his or her own Frame.

After working in the financial services industry for almost 10 years now, it's very refreshing to see someone like Ray Sclafani really address the issues that are so important if the industry wants to keep growing and be relevant to all the clients who use financial advisors. It's also a great footprint for FAs who are really looking to move to the next level in and for their businesses. It is definitely a noble profession and one that can make a difference in many lives!

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