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Media release

Change is inevitable – but so is planner success through ‘grounded’ genuine client care & service says Mentor

The importance of interpersonal skills and structuring advice practices with highly focussed efficient frameworks that allow planners to develop deeper stronger relationships with clients continues to be a major priority for Mentor Education said founder and principal Dr Mark Sinclair.

Dr Sinclair continued, “Of all professions, an individual can undertake as a trusted adviser, financial planning is by far the most dependent upon the closeness and depth of the P2P relationship”.

“Nowadays constant change has become the ‘norm’ and staying on top of compliance, administrative and due diligence demands can literally suck the very marrow from a planner’s enthusiasm to provide high level client service, care and attention”.

The challenge of running a highly successful practice that provides the principal time to deliver exemplary service has been the theme Mentor’s current webinar series and keynote speaker Mentor Chairman & Non-Executive Director Dr Jim Taggart OAM.

Dr Taggart makes no apology whatsoever during the webinars for his resolve that planners need to stay resolutely committed to ensuring every possible minute of every working day is dedicated to making clients and non-clients feel valued and appreciated. “The more times a planner reaches out to a client with genuineness for them as an individual, the more comfortable they will be in revealing their inner concerns, aspirations and financial objectives – and in doing so lay the foundation to better financial planning outcomes”.

“Being grounded in a genuine concern for people is the very bedrock on which highly successful advice businesses are built”, affirms Dr Taggart. “It starts at home with the family and extends to clients, staff, COIs – even to the stranger sitting alone in a café that you invite to share a coffee and a conversation”.

Both Dr Sinclair and Dr Taggart acknowledge that it’s not easy and the difficulty of maintaining a strict regime of time to constantly reach out to clients demands immense personal discipline and the highest of organisational skills.

As a result of the webinars, both Dr Sinclair and Dr Taggart find themselves being asked to provide more insight through PD presentations, workshops and keynote speeches at conferences on strategies and practices that enhance client engagement.

Dr Taggart's detailed insight into his '7 Habits of a Highly Successful Financial Planner' are always especially well received.

1. Put family first, ruling out times in your diary that are non-negotiables;
2. Start each day by sending a message to your family members first, then staff and at least 10 clients to show that you are thinking of them;
3. Divide your week into 10 sessions, be in the office one (e.g. Wednesday morning) and be on the road meeting and speaking to clients the other nine;
4. Put your attention into your staff because good staff will always put your clients first;
5. Build a support team who will receive and send emails on your behalf, give you a list of people to call each day, make appointments and action meeting outcomes (Dr Taggart had 3 front-line support staff);
6. Take every opportunity to meet people, get to know them and brighten their day; and
7. Cultivate relationships as your number-one, life-long, strategic asset.

Dr Sinclair and Dr Taggart concluded, "Planners need to do whatever it takes to make sure delivering exceptional client service is the number one priority for the practice. Hire the best staff, constantly upgrade skills through learning and development until it's engrained in the very DNA of the practice that delivering exceptional client experiences are the norm".

"The reward will be strong new business growth and referrals as the result of a highly-regarded business reputation, personal brand and a competitive edge over competitors and robo-advice providers".

Notes to the editor: **Mentor Education webinar details are available from the website www.mentor.edu.au**

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About Dr. Mark Sinclair, Managing Director & Founder

Dr. Mark Sinclair is the founder and Managing Director of Mentor Education.

Dr. Sinclair started providing financial services training in 2003 with a strong desire to provide high levels of student satisfaction and skill-based learning outcomes.

This 'student focus' is a direct result of Mark's doctoral studies, corporate advisory experience with AT Kearney and KPMG, and his time tutoring to the MBA program at RMIT.

During his career, Mark has advised senior executives at over 100 organisations in a broad range of industries throughout Australia, Southeast Asia and the Middle East including strategic assignment with the Commonwealth Bank of Australia, Department of Education, Telstra and the Reserve Bank of Indonesia.



About Dr. Jim Taggart, OAM, UND Adjunct Professor and Chairman of Mentor Education

Mentor Education is delighted to have Adjunct Professor Dr. Jim Taggart OMA as the Chairman and independent director of the Mentor Board, past president of the Association of Financial Advisers, and who sits on the board of TAFE NSW.

Jim Taggart has over 20 years of board level experience across the public (local & state), private (finance planning, investment, development) and not for profit (church, community & fundraising) sectors. At board level, highlights include being a member of the Asia Pacific Financial Services Association, Investment Board for the Parramatta Diocese; (Chairman) Salvation Army Advisory Board (Business Appeal); Audit Committee Member, Hills Shire Council; Parramatta Stadium and TAFE NSW Western Sydney Institute.

In an executive capacity, Jim established the highly successful Taggart Group in 1987 and is currently Director, Western Sydney Institute of Sport. Jim has a Doctorate of Business Administration (DBA) and is also a recipient of the Medal of the Order of Australia (OAM) and won the Association of Financial Advisers, Financial Advisor of the Year Award in 2005.