



BUILDING CHAMPIONS IN SPORT AND BUSINESS

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## Advice Matters: It's Not Just What You Say, but How You Say It

**Program Deliverables:** Provide advisors with the essentials to building long-standing, trusted advisory relationships with clients. Teaches advisors how to demonstrate the value of their advisory fee, provide more than "commoditize-able content", and master the "process" of advice-giving.

### Program Description

The growth of low-cost brokerage services and robo-advisors has led clients to ask "What added value do I receive for the fee that I pay to my advisor?" Providing clients with access to investment products, software-generated financial plans, and recommended asset allocations are not enough. Such commoditized advice must be complemented by a valued advisory process that delivers much more. The interpersonal and customized benefits of advice-giving can be achieved only through human interaction – via the advisor-client relationship.

For the foreseeable future, the process of advice-giving will be the differentiator. HOW advice is delivered to and perceived by clients will be what distinguishes advisors from the competition. Drawing upon his expertise as a licensed psychologist and his extensive experience advising world-class performers, Dr. Jensen shows you how to:

- Master the stages of advice-giving
- Seek and reflect understanding
- Build essential interpersonal skills
- Develop long-term, trusting relationships

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## Dr. Rick Jensen



Dr. Rick Jensen is a world-renowned performance coach, sport psychologist, and author. In golf, his clients include more than 50 touring pros on the PGA, LPGA and Champions Tours who have combined to win over 200 tour victories and 33 major championships. Dr. Jensen has also trained tennis champions including winners of all four Grand Slam championships.

In the world of financial services, Dr. Jensen has consulted with top firms including Merrill Lynch, Morgan Stanley, UBS, LPL, and Wells Fargo. He has coached hundreds of financial advising teams and trained management at all levels.

Dr. Jensen is the author of *Drive to the Top: 5 Timeless Business Lessons Learned from Golf's Greatest Champions* and *Easier Said Than Done: The Undeniable, Tour-Tested Truths You Must Know (and Apply) to Finally Play to Your Potential on the Golf Course*. He has been featured on ABC, ESPN, CNN, and the Golf Channel, and is also a contributing writer for Golf Digest and GOLF Magazine.