



By Jerry V. Teplitz, J.D., Ph.D.

**Graphs compiled for a
FINANCIAL ADVISOR COMPANY
Pre and Post Form Analysis**

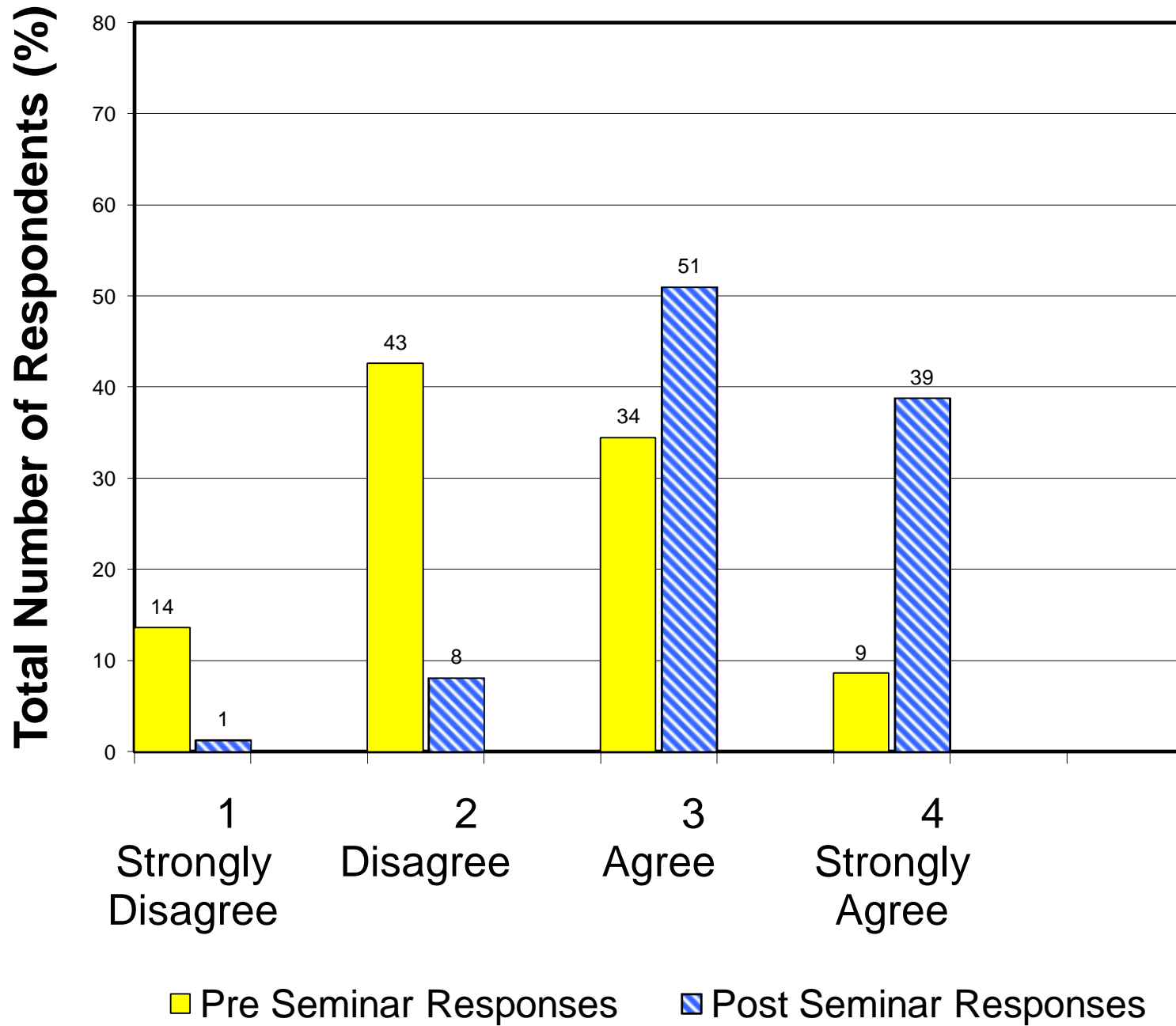
111 Participants

Instructor: Jerry Teplitz

*Jerry Teplitz Enterprises
1304 Woodhurst Drive, Virginia Beach, VA 23454
757-496-8008 Fax (757) 496-9955
www.Teplitz.com Info@Teplitz.com*

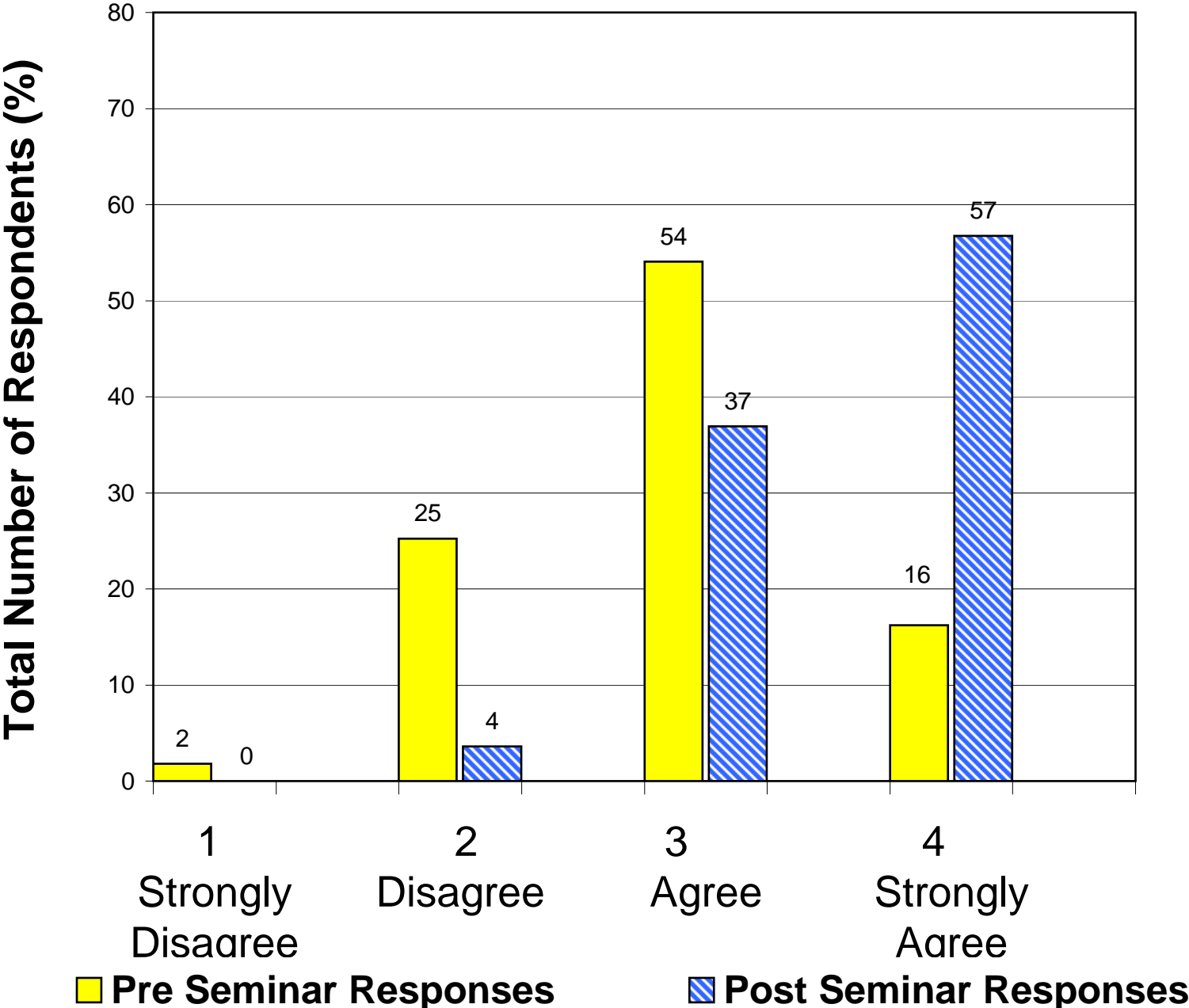
Comparison: Pre and Post Seminar Responses

OVERALL AVERAGE



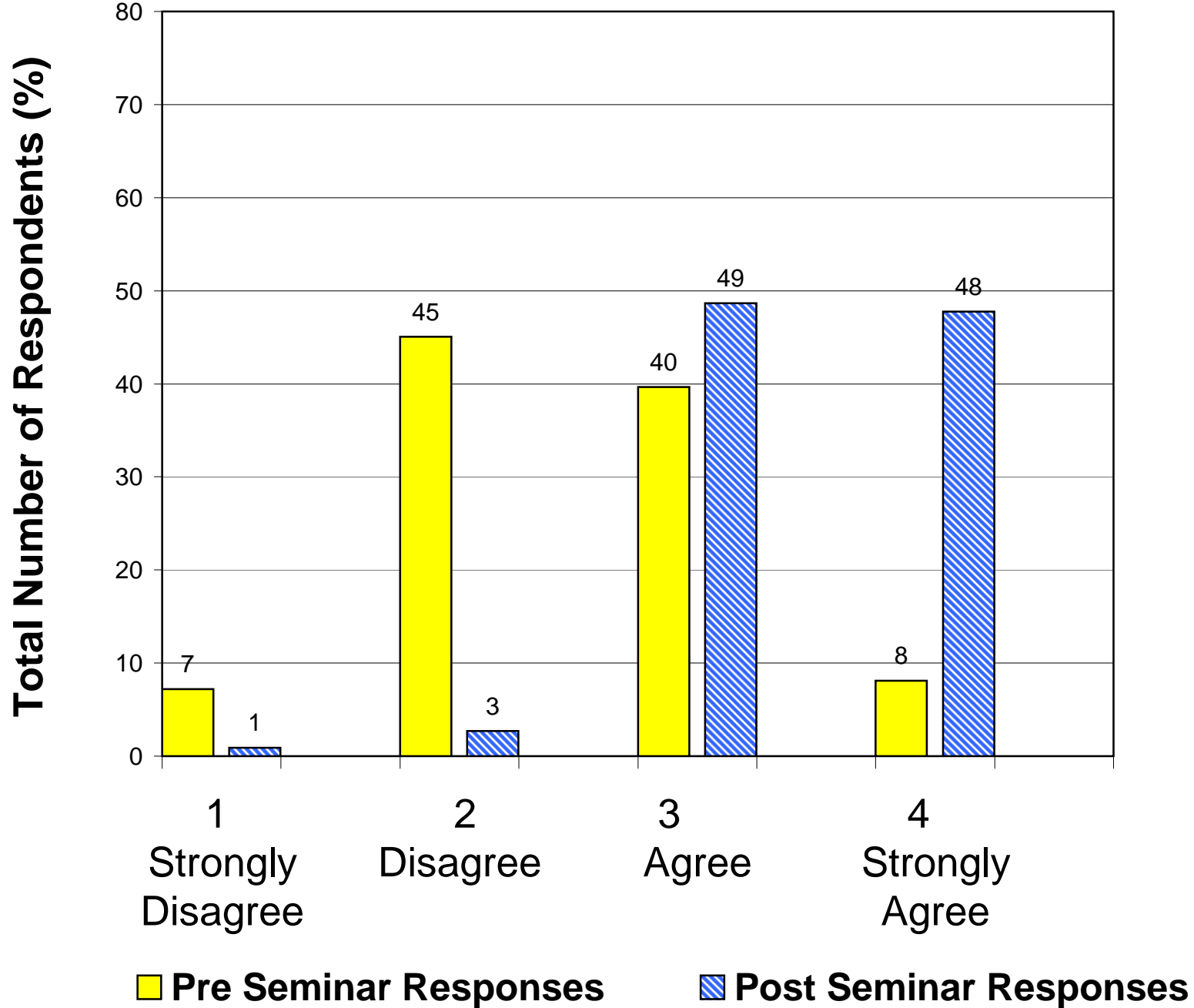
COMPARISON: PRE AND POST SEMINAR RESPONSES

I am confident and comfortable setting goals



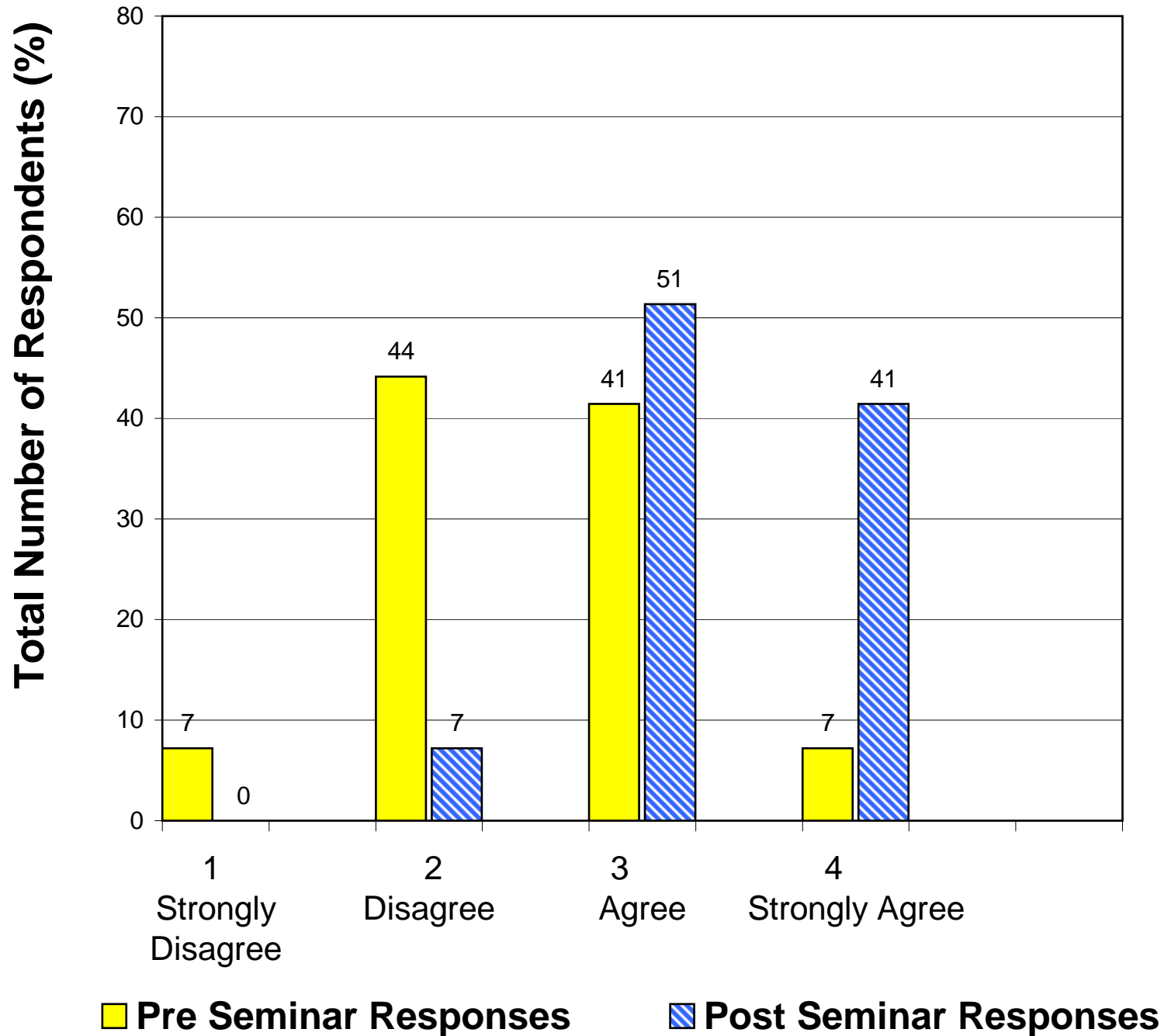
COMPARISON: PRE AND POST SEMINAR RESPONSES

I am comfortable succinctly describing what I do and quoting my fee



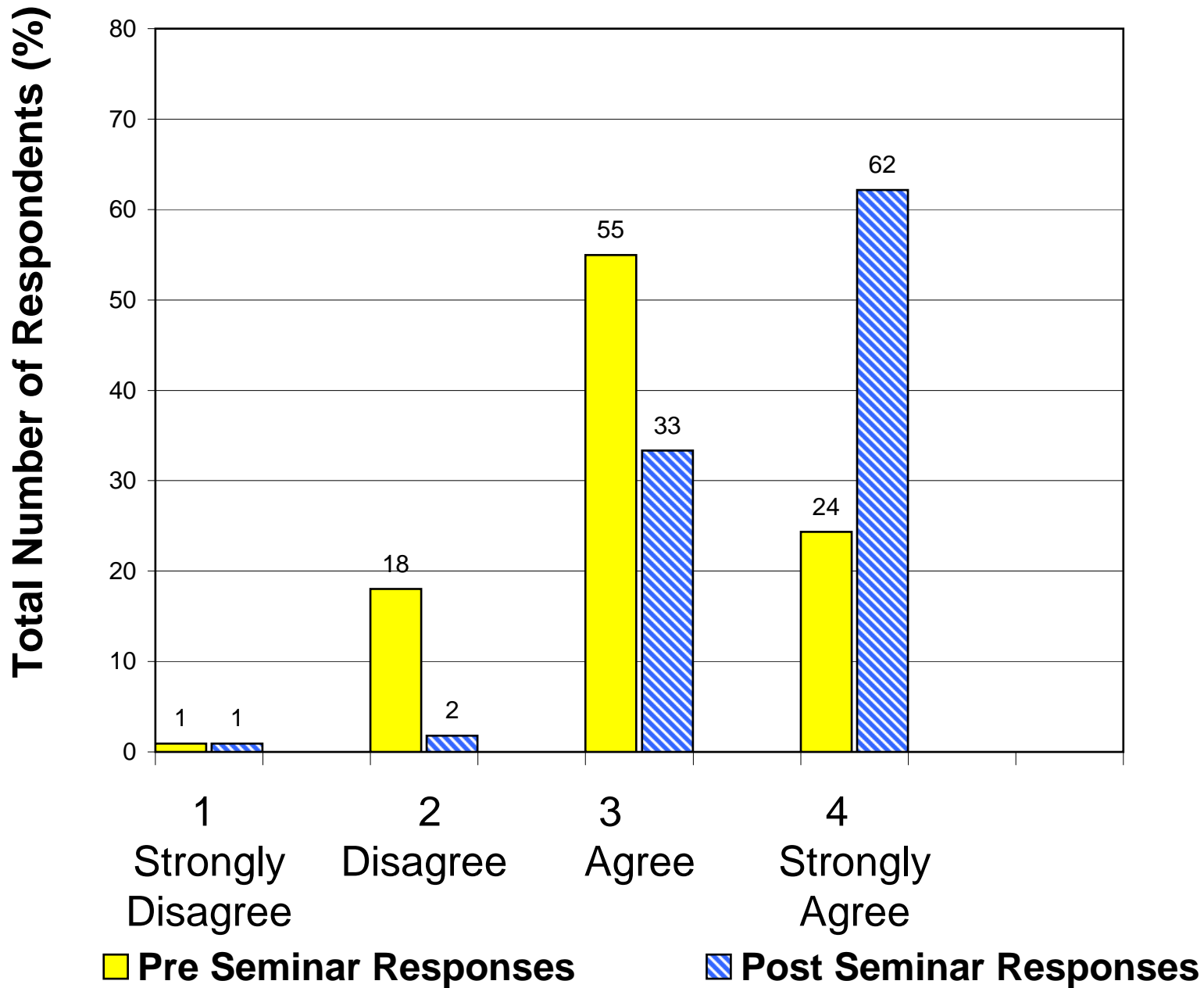
COMPARISON: PRE AND POST SEMINAR RESPONSES

I feel confident that I can succinctly and effectively answer any questions a client or prospective client might ask about my service and / or my fee

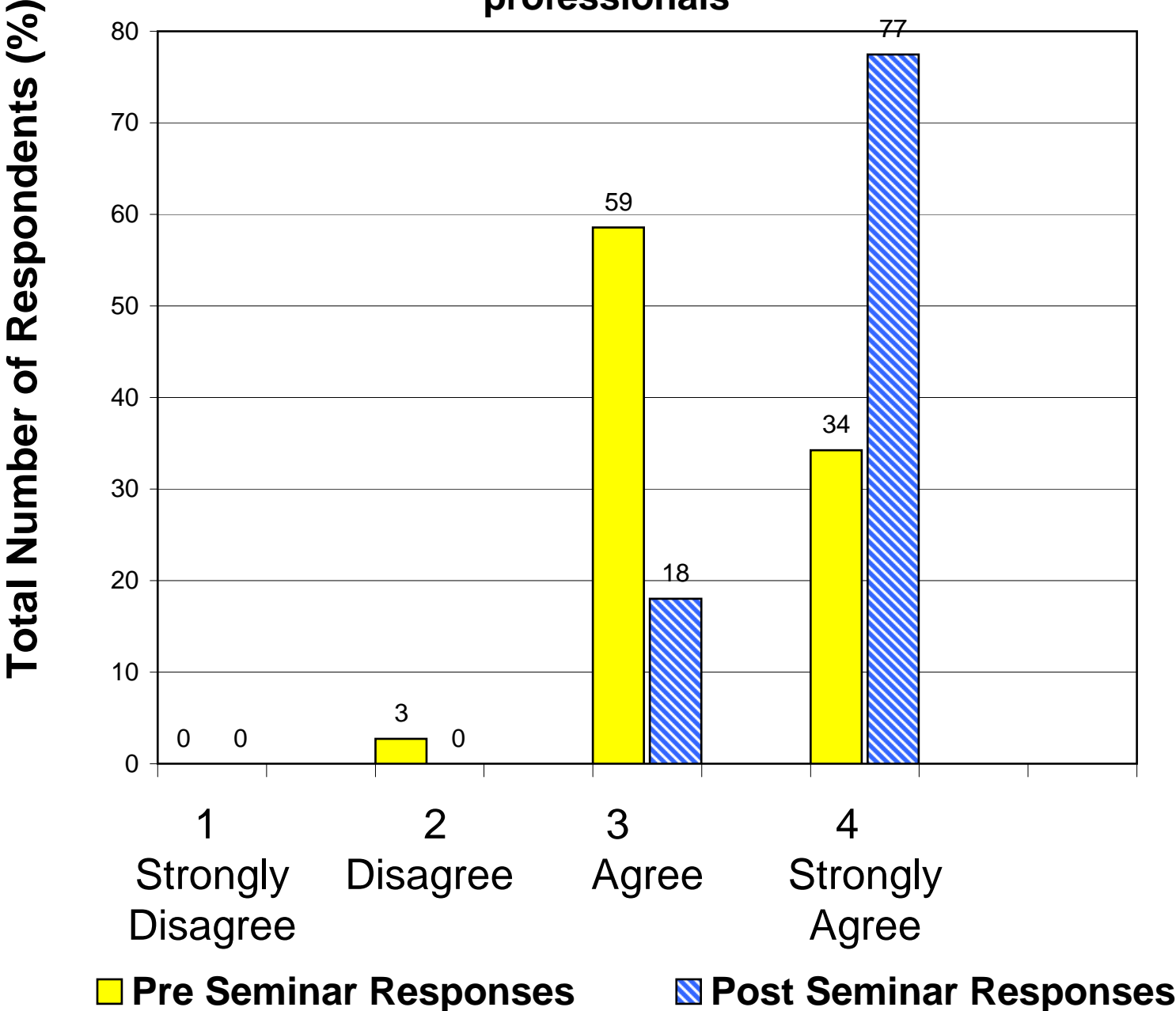


COMPARISON: PRE AND POST SEMINAR RESPONSES

I view myself as being a MUCH better Financial Advisor than 99% of financial professionals

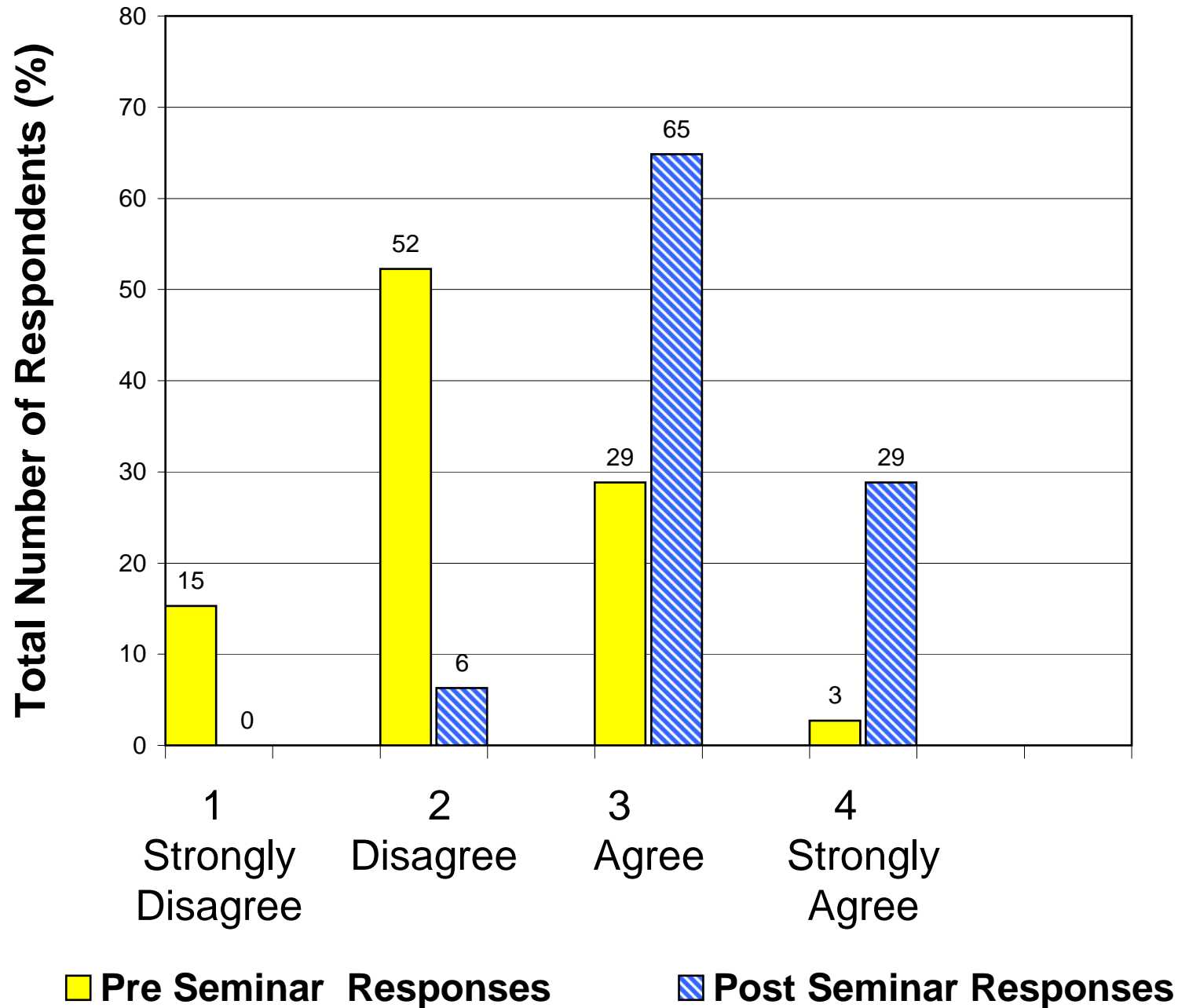


COMPARISON: PRE AND POST SEMINAR RESPONSES
I believe the work that I do as a Values-Bases Financial Planner distinguishes me significantly from other financial professionals



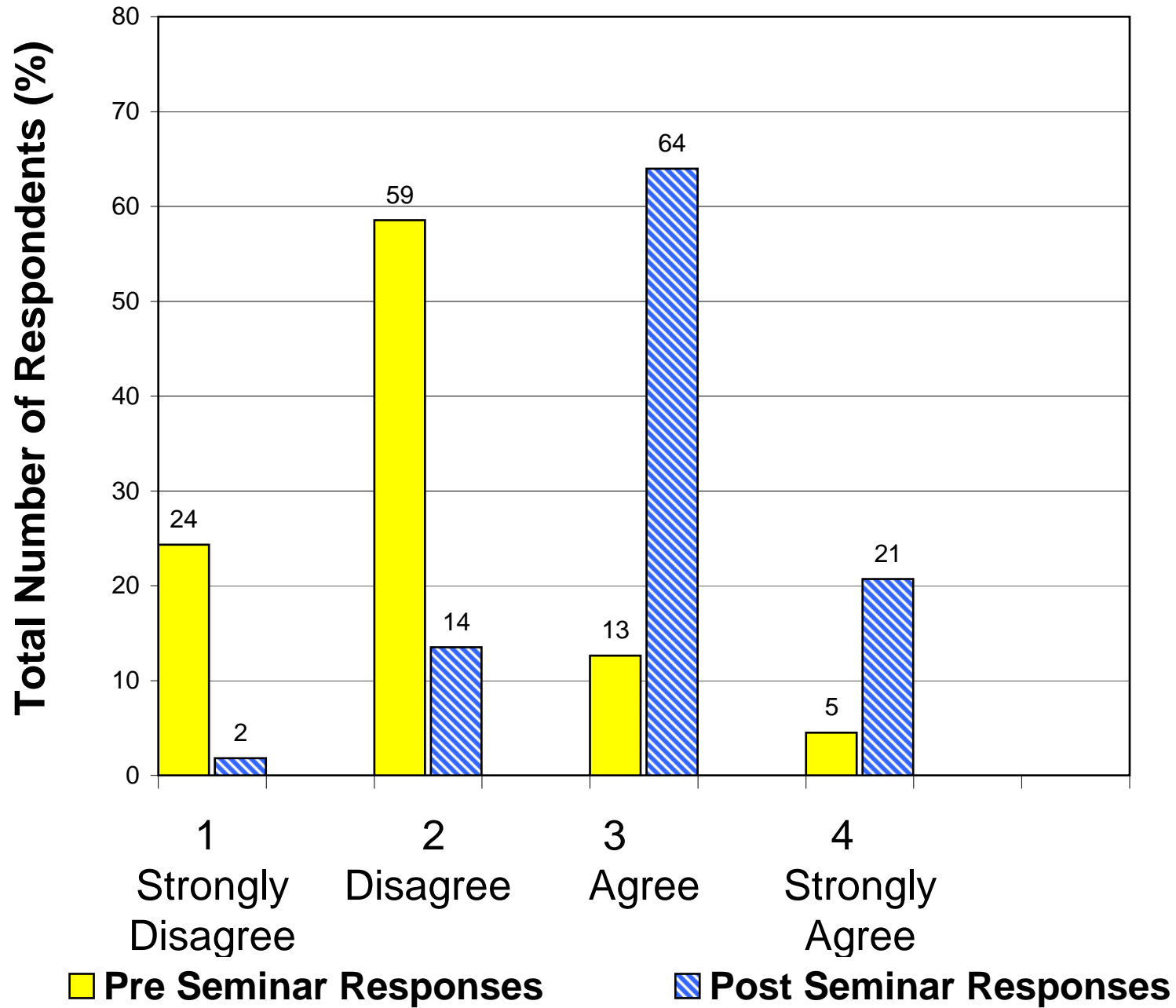
COMPARISON: PRE AND POST SEMINAR RESPONSES

I enjoy doing client acquisition work

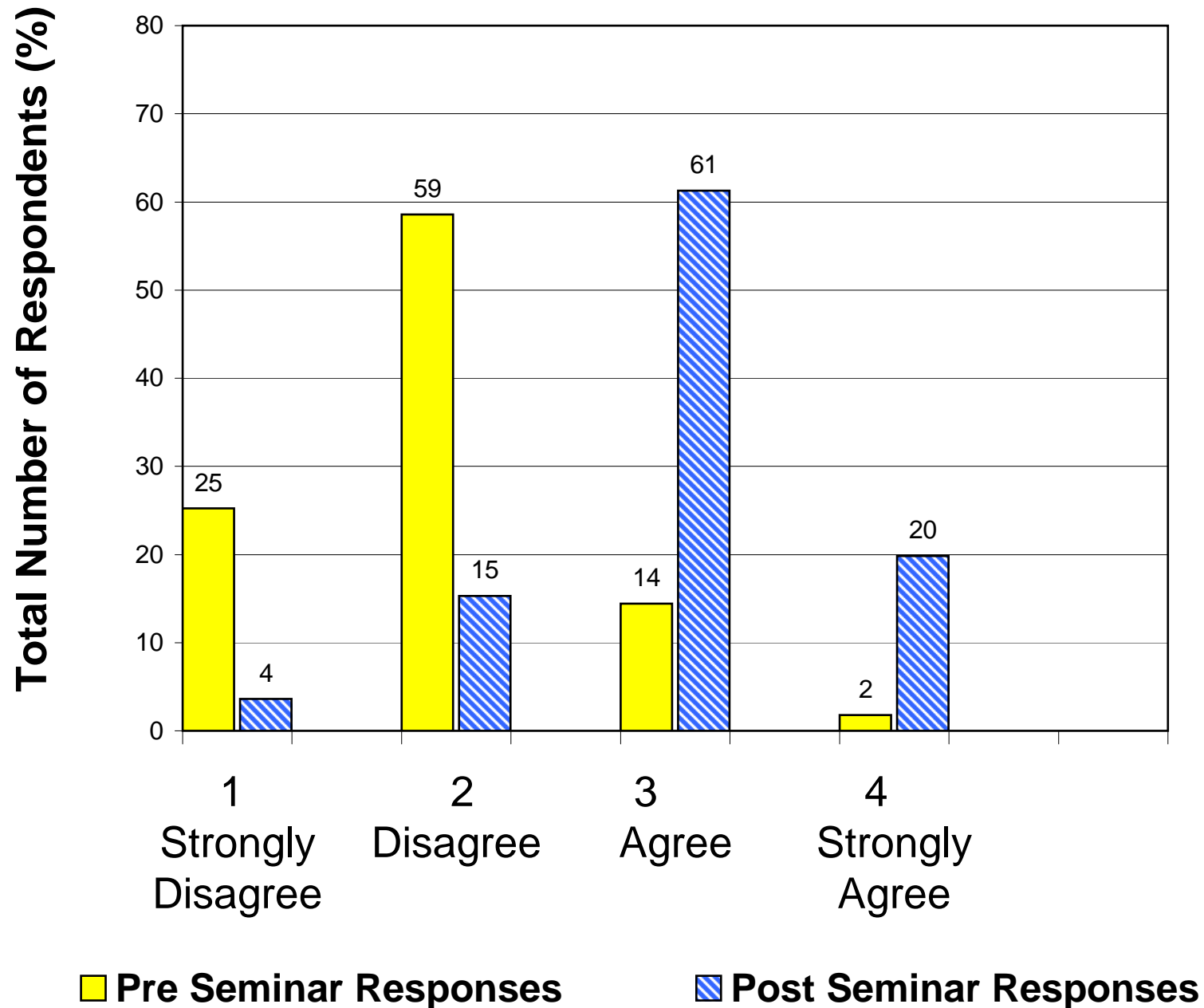


COMPARISON: PRE AND POST SEMINAR RESPONSES

I am effective at client acquisition work

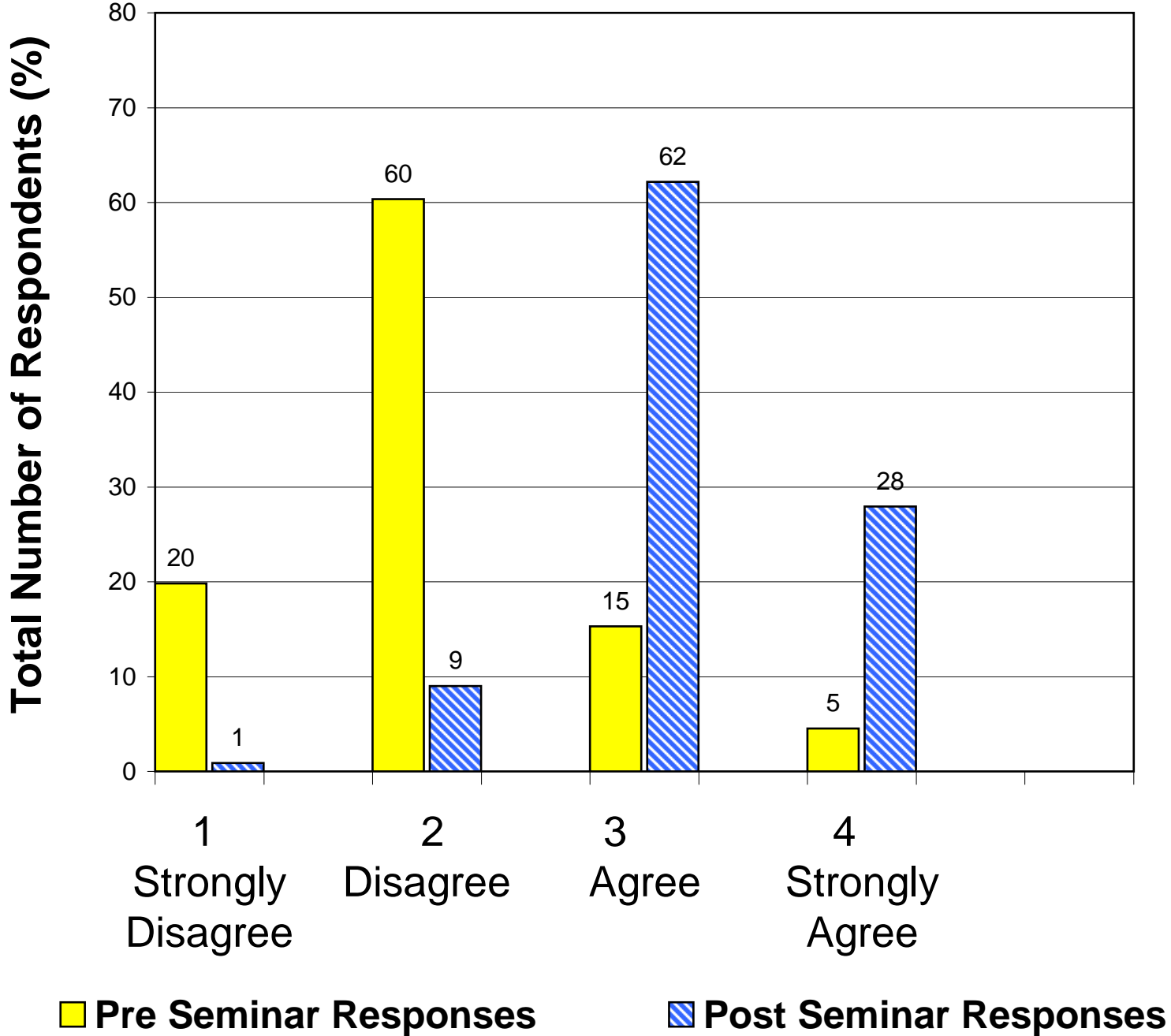


COMPARISON: PRE AND POST SEMINAR RESPONSES
I view myself as successful at client acquisition work

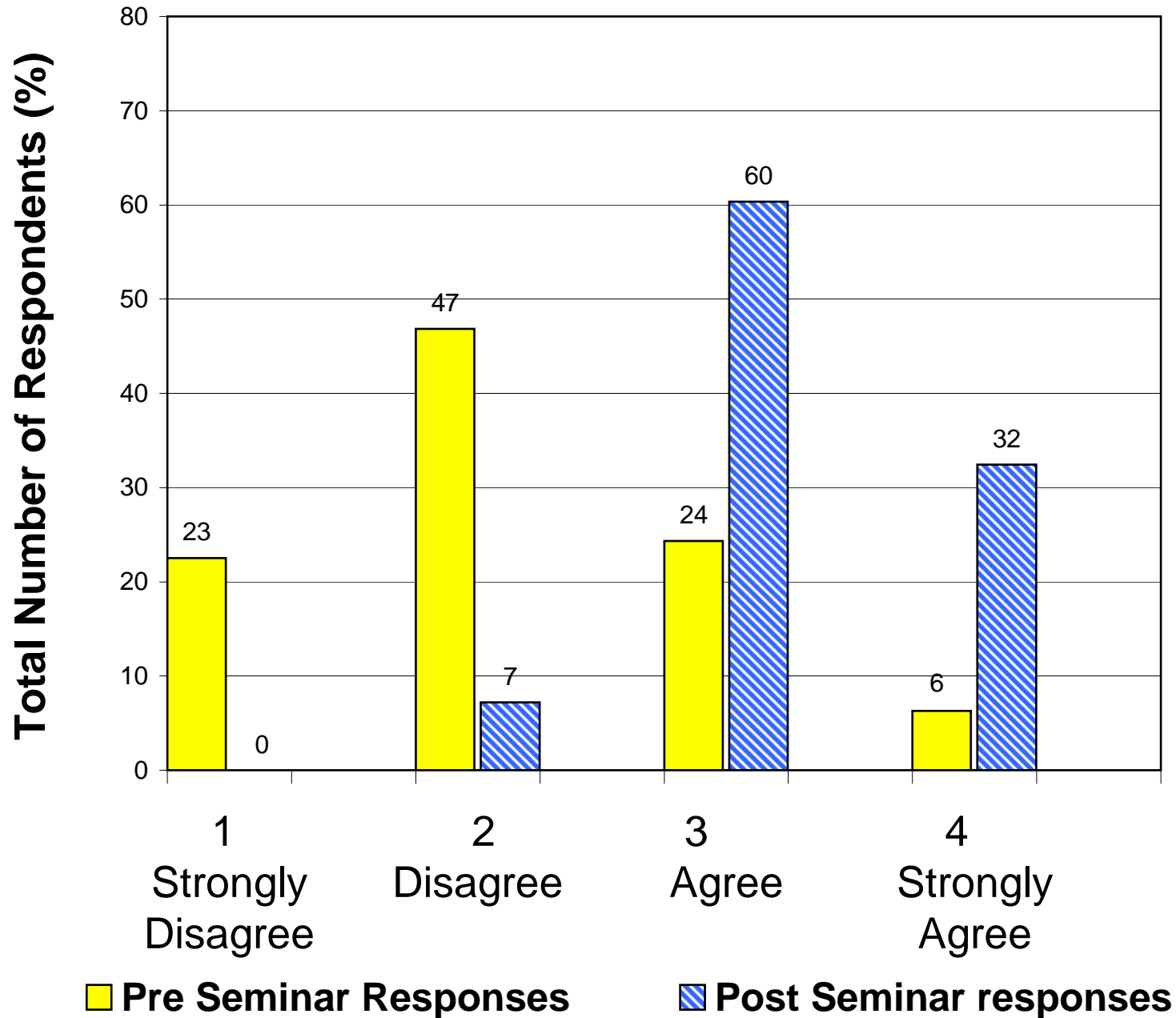


COMPARISON: PRE AND POST SEMINAR RESPONSES

It is easy for me to ask for referrals

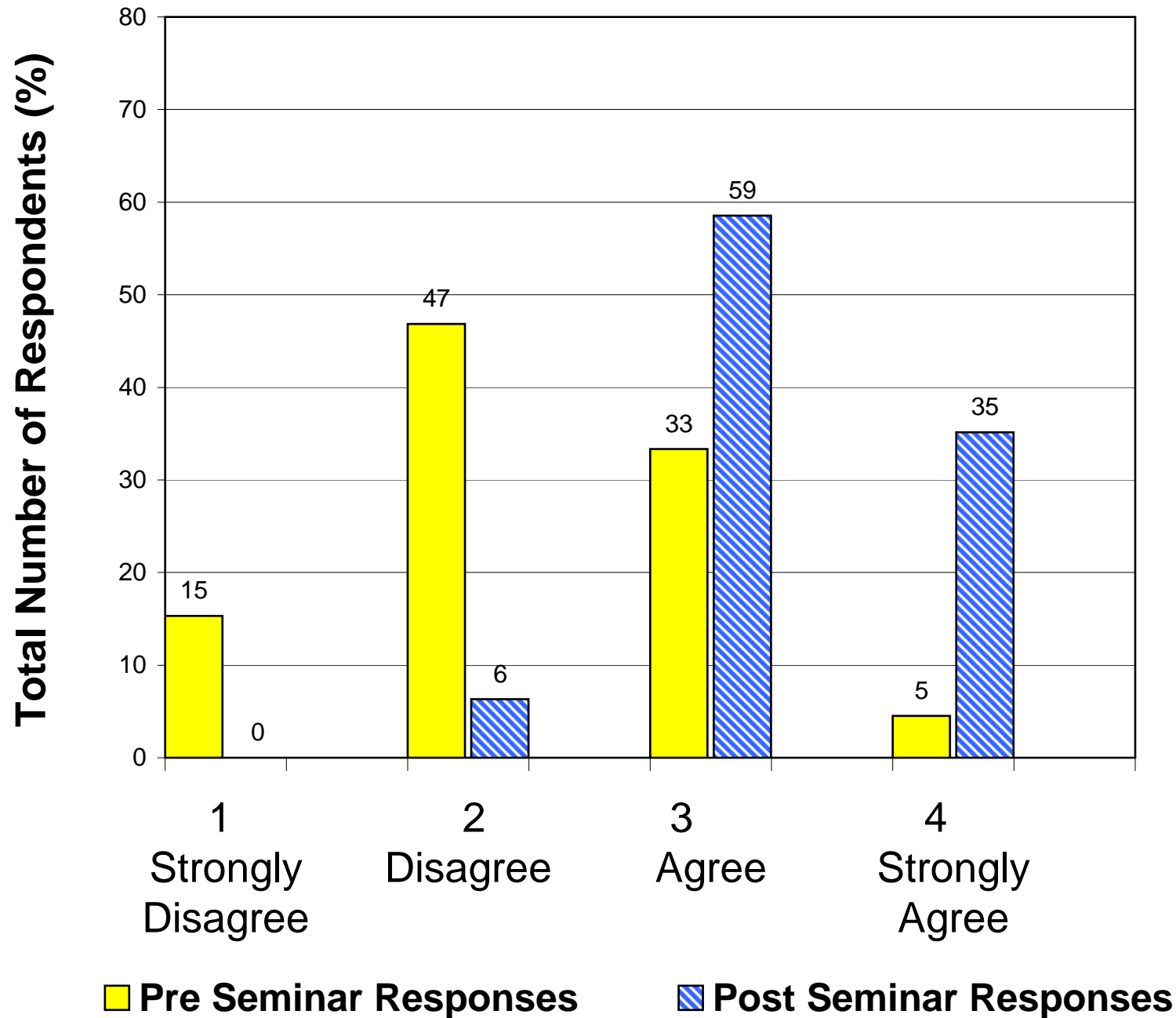


COMPARISON: PRE AND POST SEMINAR RESPONSES
**I am effective at learning about my clients referrals
prior to contacting them**



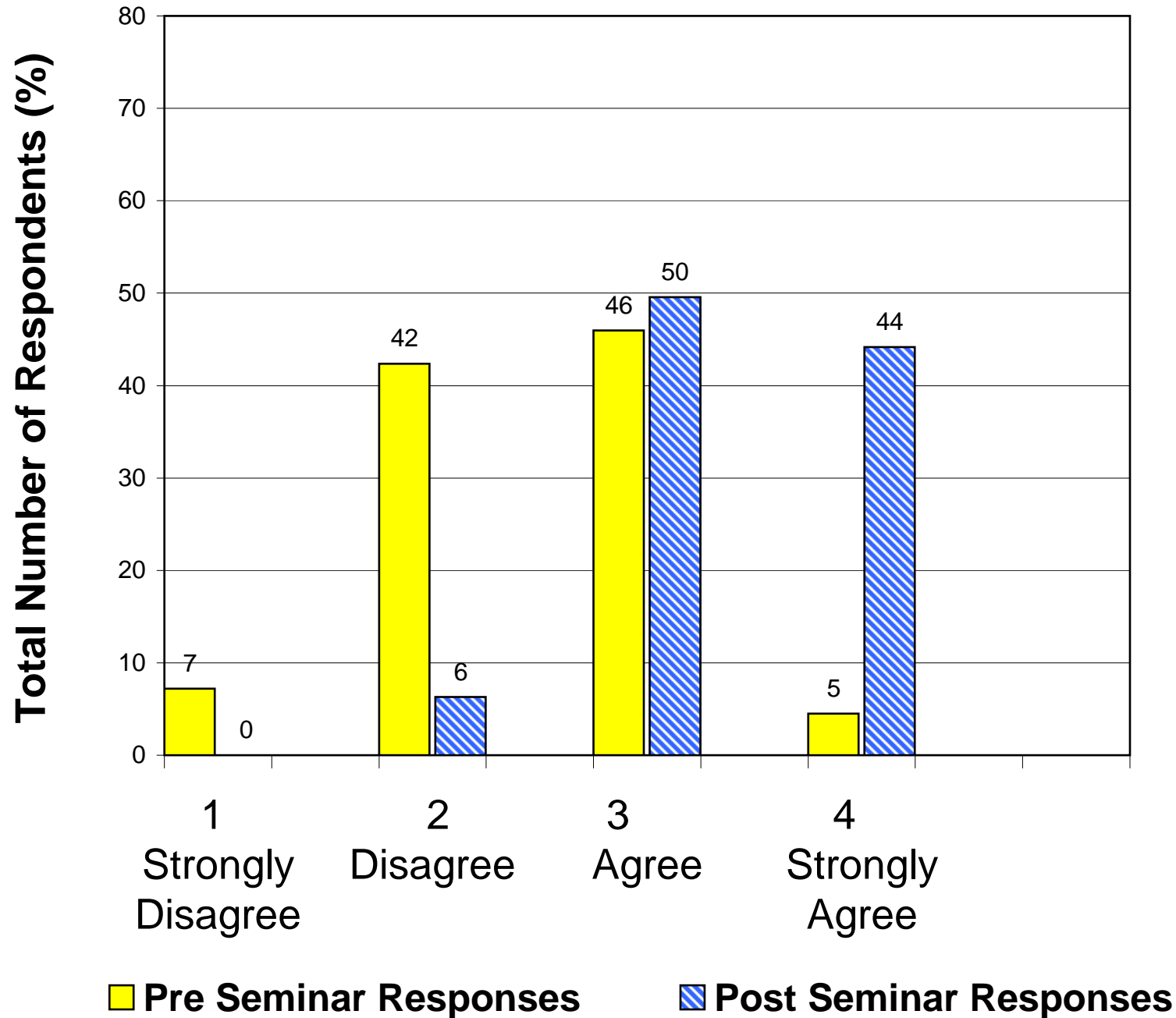
COMPARISON: PRE AND POST SEMINAR RESPONSES

It is easy for me to make follow up phone calls to people to whom I have been referred



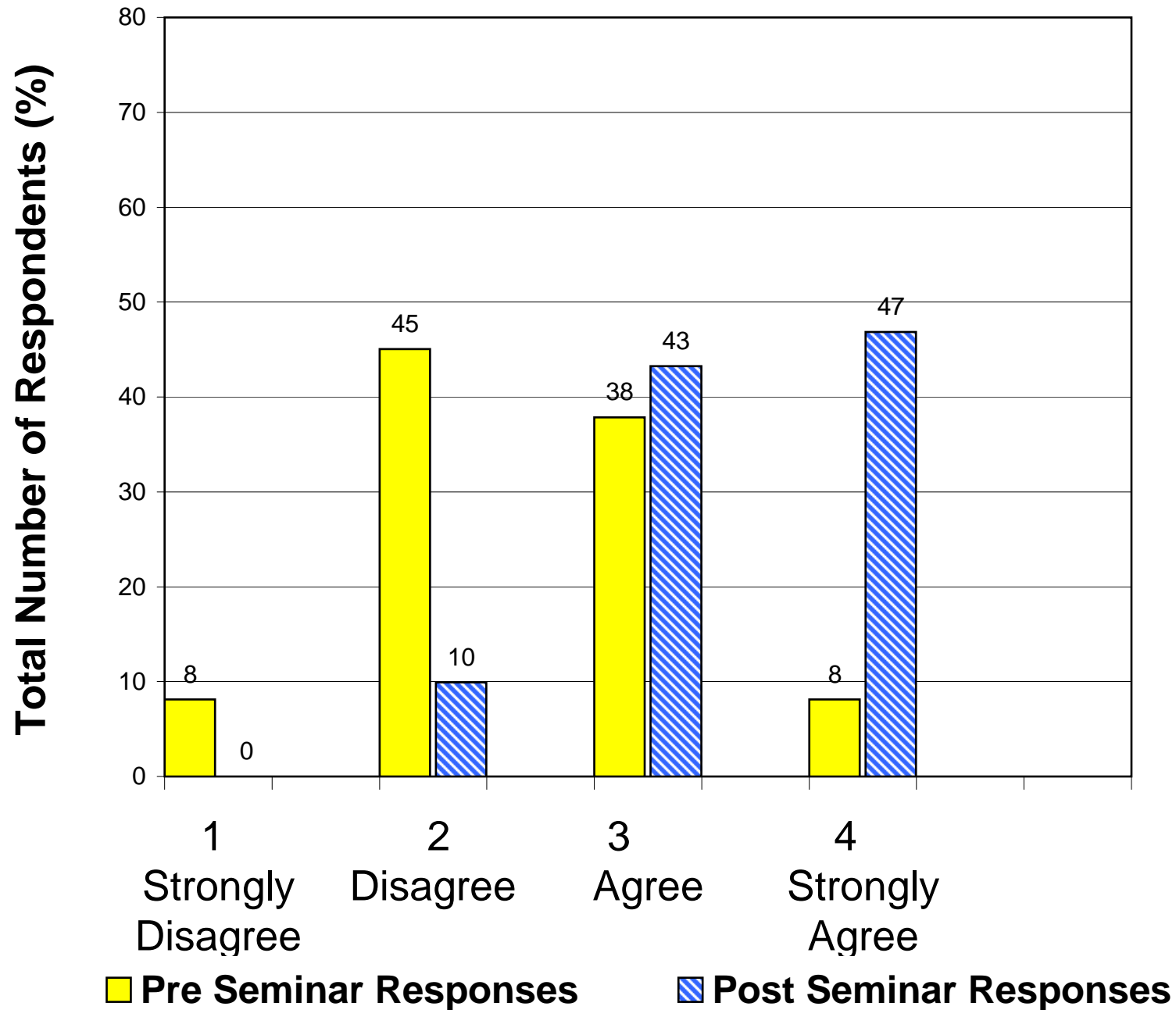
COMPARISON: PRE AND POST SEMINAR RESPONSES

I am comfortable talking on the telephone with referrals and self-referrals



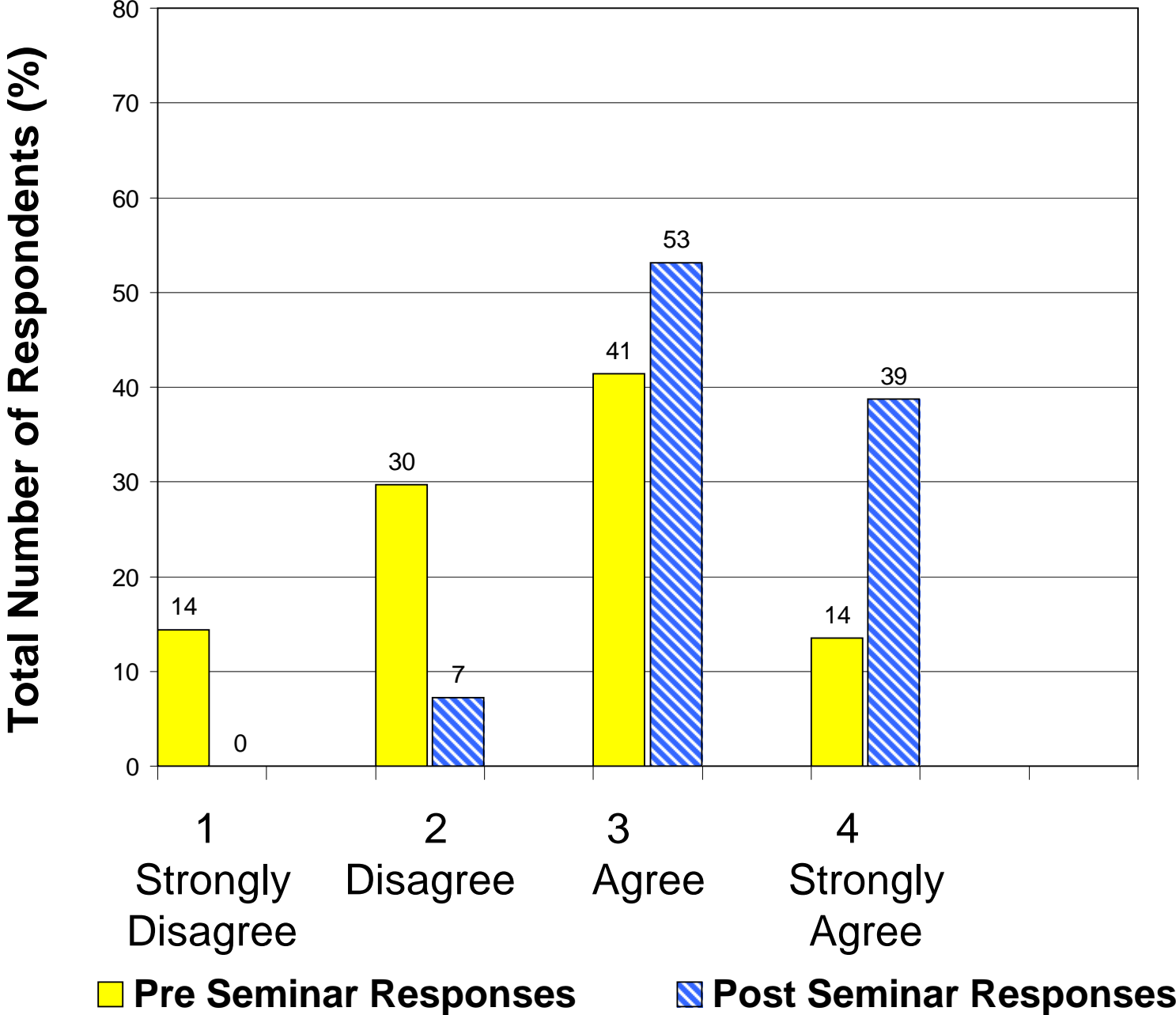
COMPARISON: PRE AND POST SEMINAR RESPONSES

I am effective at conducting phone consultations

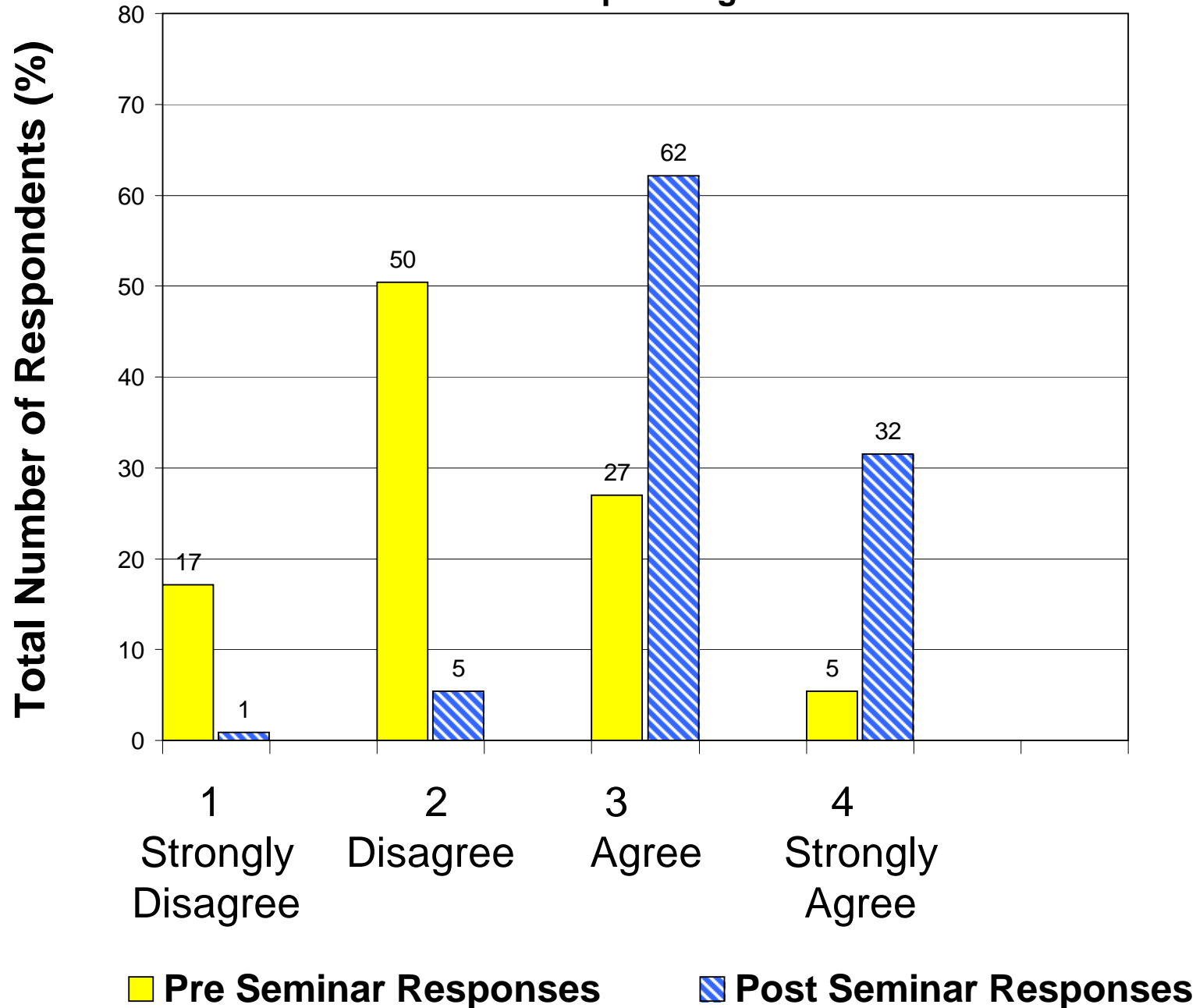


COMPARISON: PRE AND POST SEMINAR RESPONSES

I find it easy to engage new people I meet at a social or business function in conversation

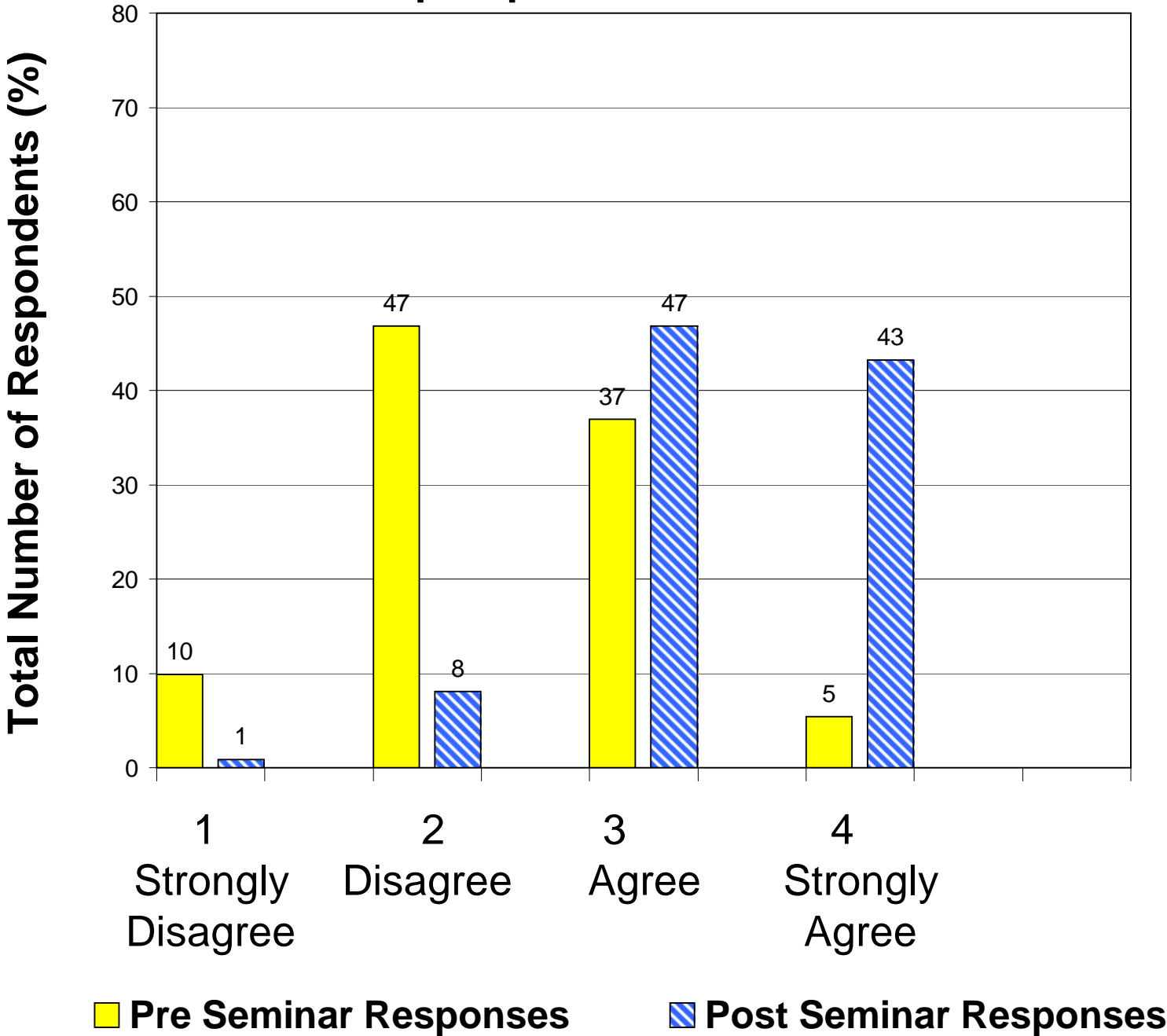


COMPARISON: PRE AND POST SEMINAR RESPONSES
I enjoy telling new people I meet about what I do, asking them questions
to learn about them and offering to introduce
Values Based Financial planning to them when relevant



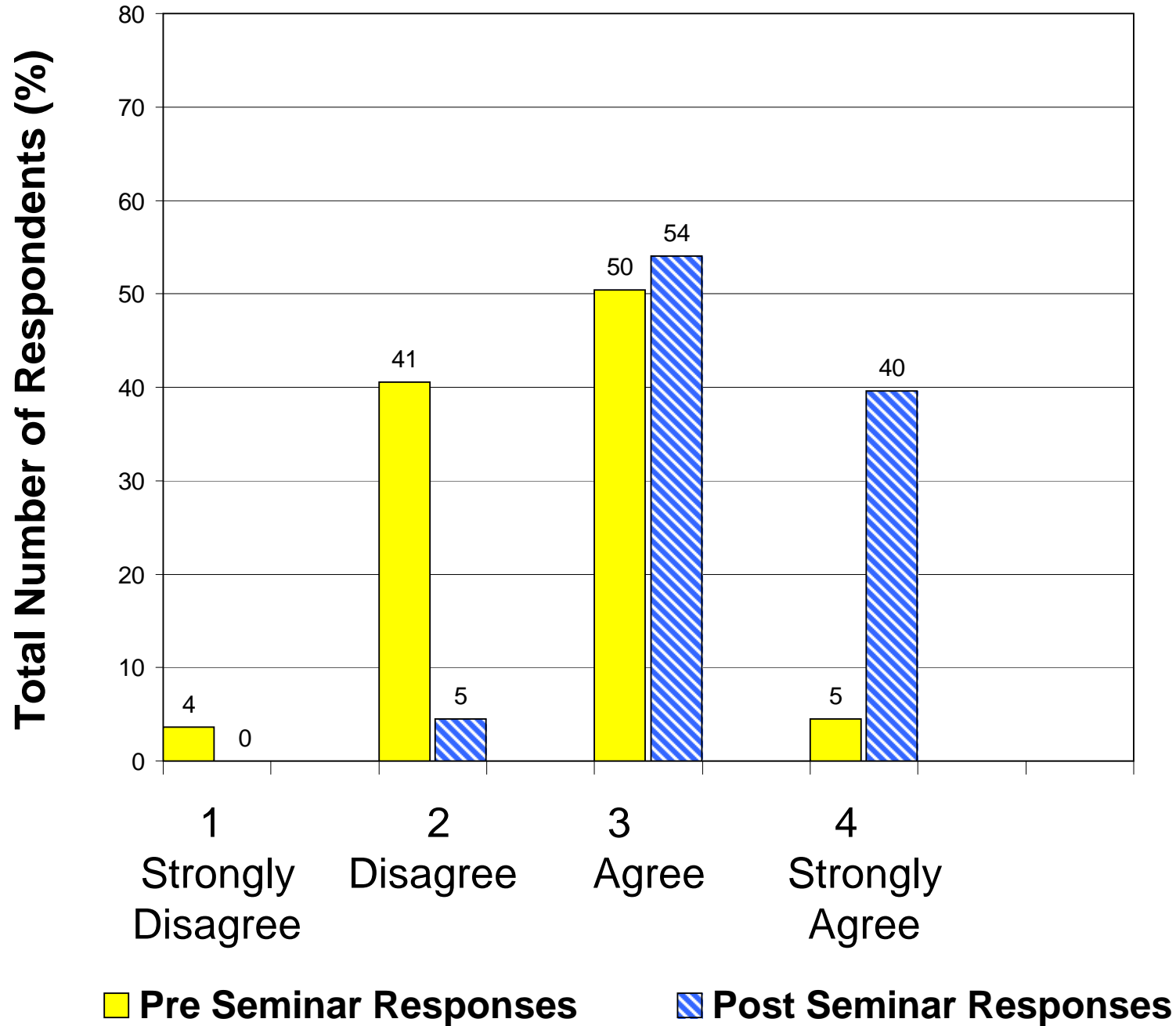
COMPARISON: PRE AND POST SEMINAR RESPONSES

I easily make deep emotional connections with prospects and clients



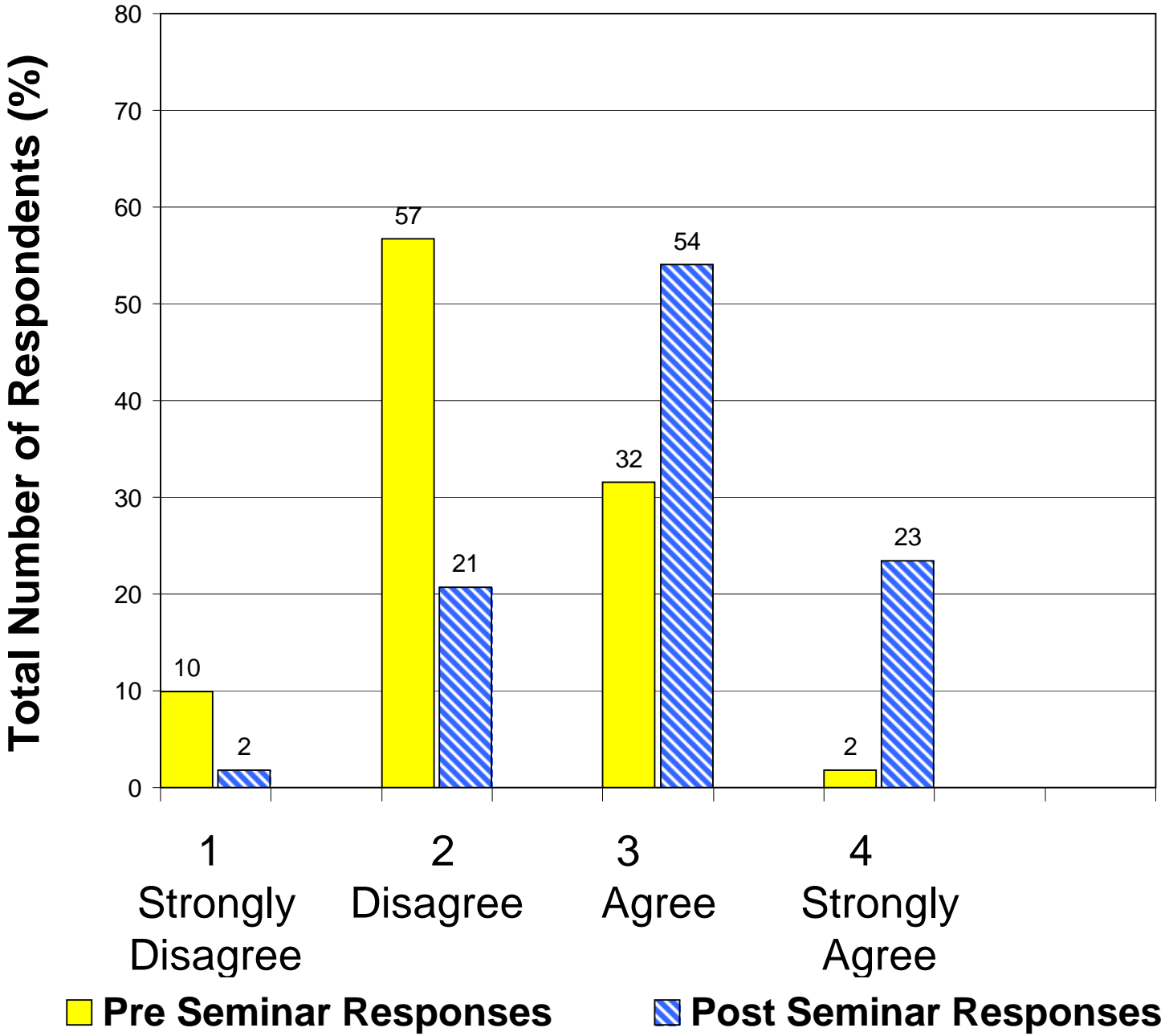
COMPARISON: PRE AND POST SEMINAR RESPONSES

I am confident about holding my clients accountable to implement my advice, whether they are comfortable or not



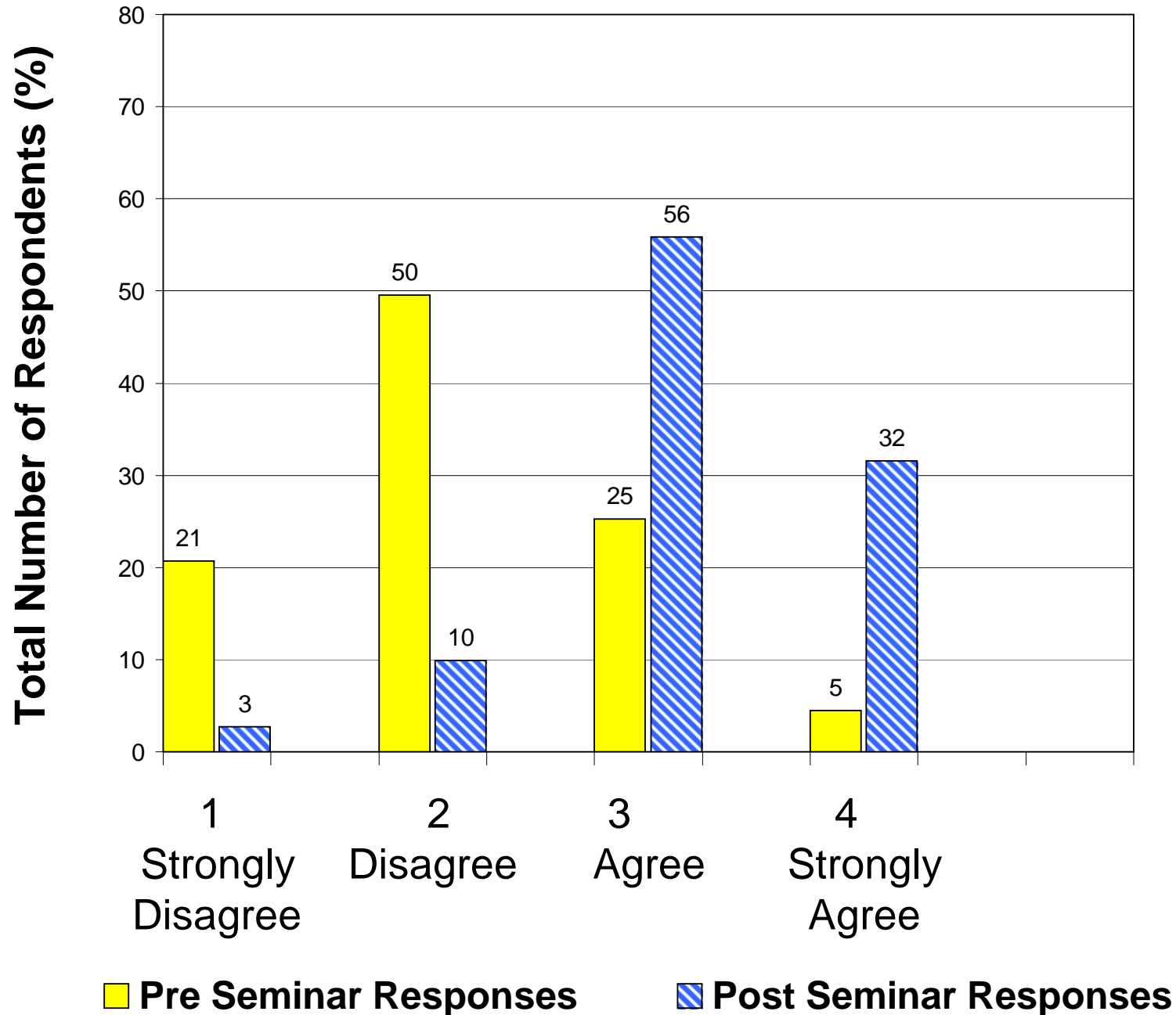
COMPARISON: PRE AND POST SEMINAR RESPONSES

**I have a well organized and complete script binder
for what I need to say and do to build my pool of
prospects and convert some of them to Ideal Clients**



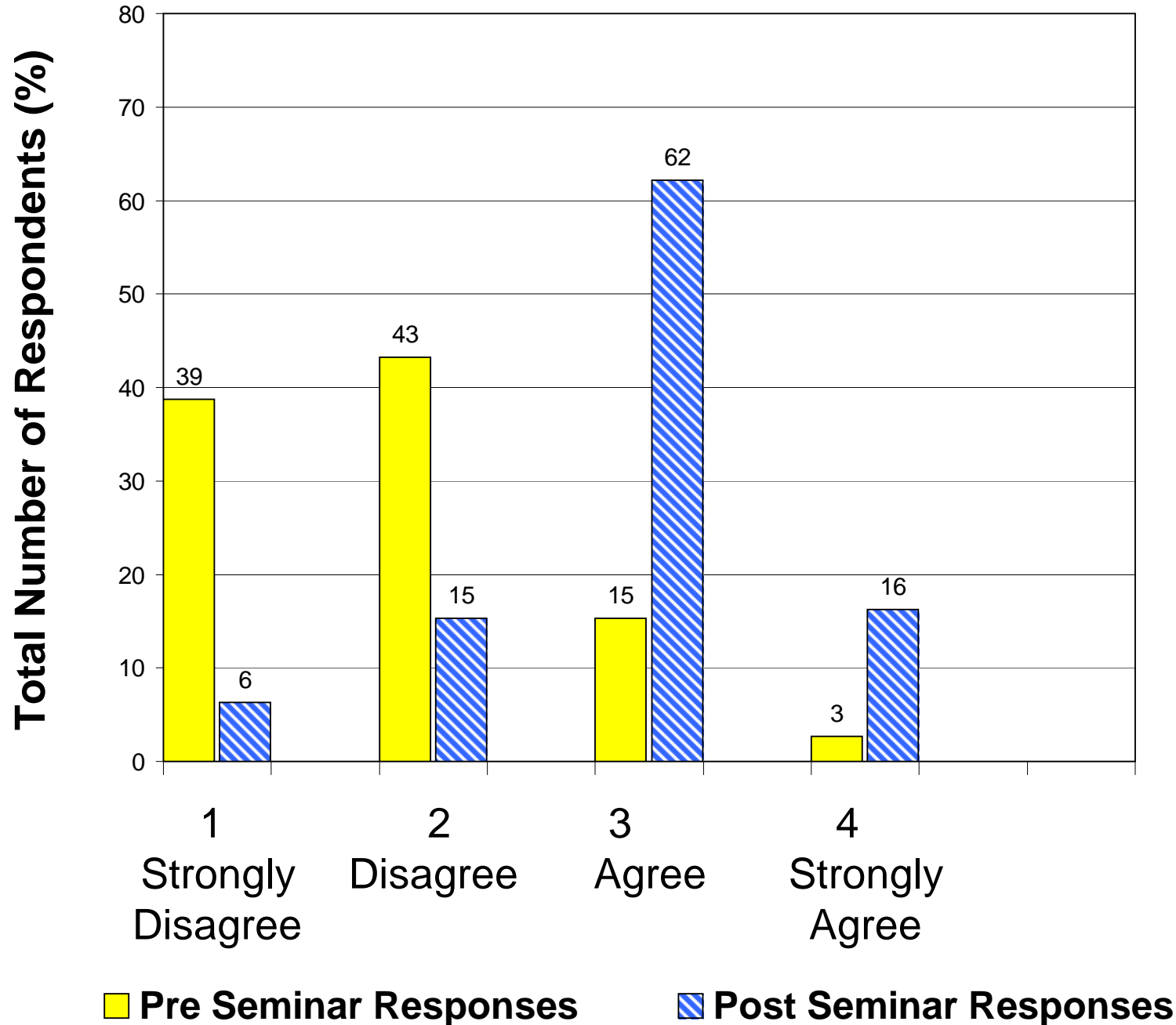
COMPARISON: PRE AND POST SEMINAR RESPONSES

I easily plan my high payoff activities in my calendar in advance

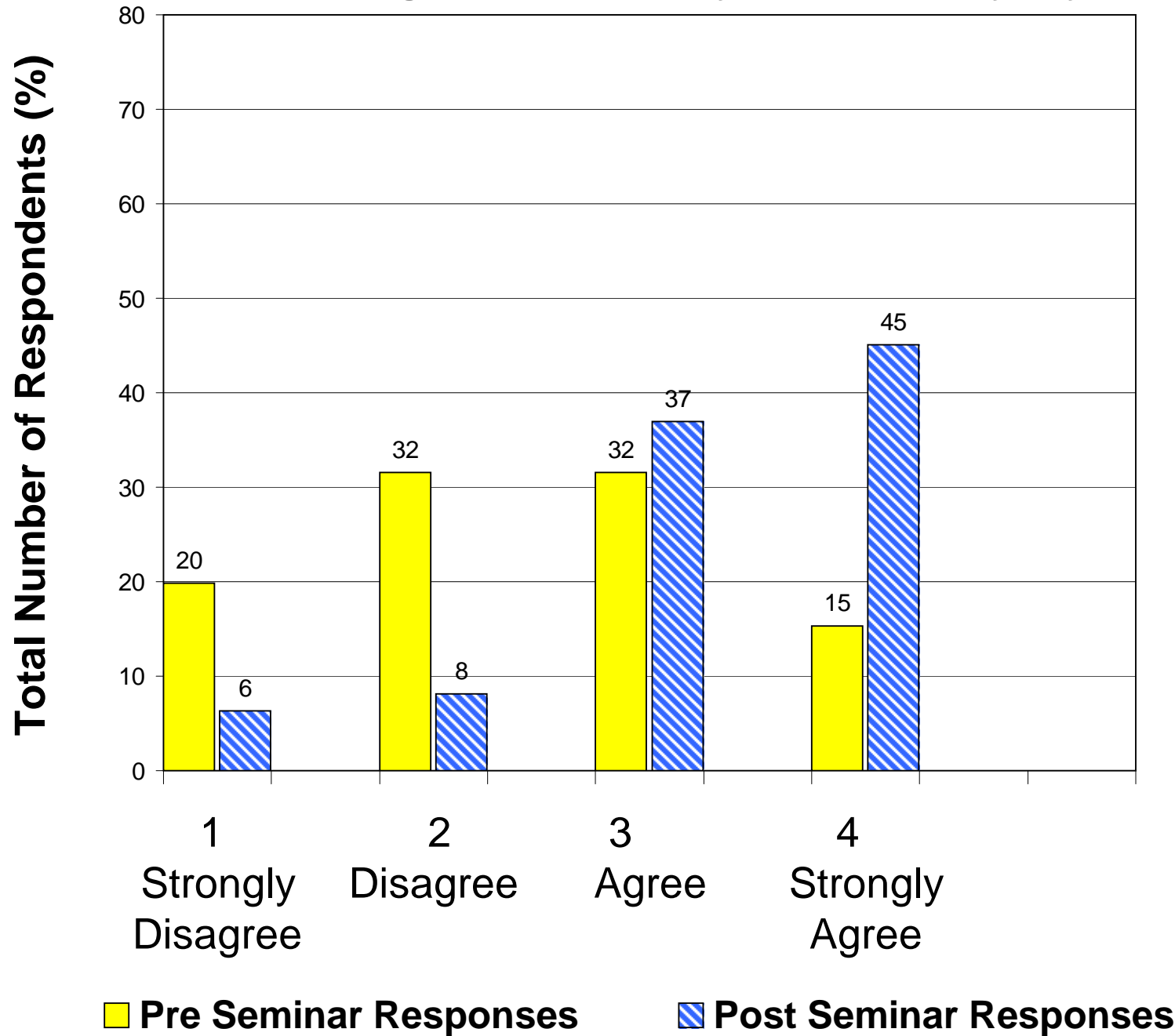


COMPARISON: PRE AND POST SEMINAR RESPONSES

I easily keep track of where my time actually goes in my calendar when what I actually do is not what I planned to do

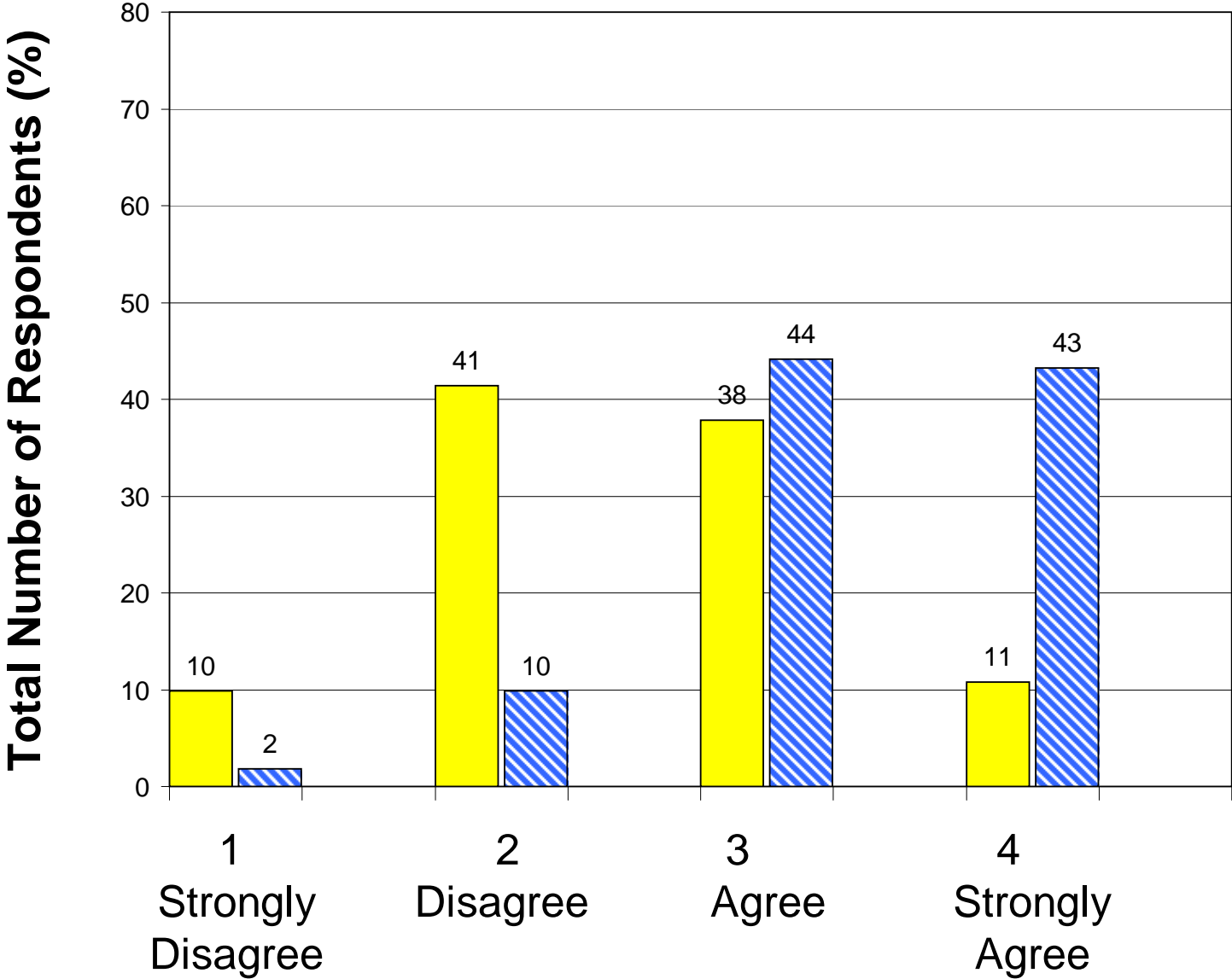


COMPARISON: PRE AND POST SEMINAR RESPONSES
I easily log onto the Committed Advisor Study Group reporting
and tracking area to report my numbers every day



COMPARISON: PRE AND POST SEMINAR RESPONSES

I view myself as prosperous



Pre Seminar Responses

Post Seminar Responses