

ADVISOR TRAINING MINISTRY
COURSE NUMBER: SPP 500

Brought To You By:



TRANSFORMATIONAL
STEWARDSHIP

ADVISOR TRAINING MINISTRY
COURSE NUMBER: SPP 500

Helping Families Evaluate Where They Are In Their Planning

TAYLOR UNIVERSITY



Evaluating Where We Are in Our Planning



10 POINT CHECKLIST
(spouses do this separately)



Evaluation #1

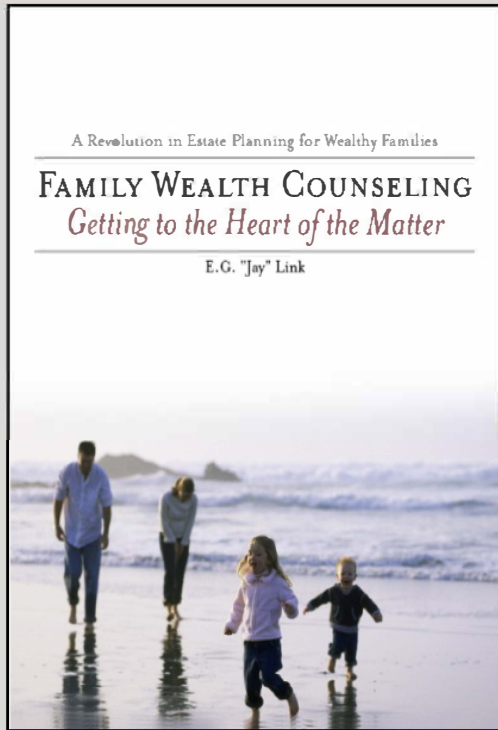
I am totally familiar with our current financial situation, what our current “estate plan” does, and my spouse and I are on exactly the same page regarding what it will do.

Not at All

Perfect

1...2...3...4...5...6...7...8...9...10





Chapter 5

The Discovery Retreat: The Most Important Day

Chapter 6

The Power is in the Questions: Gaining Enhanced Clarity, Greater Confidence and Increased Leverage



Evaluation #2

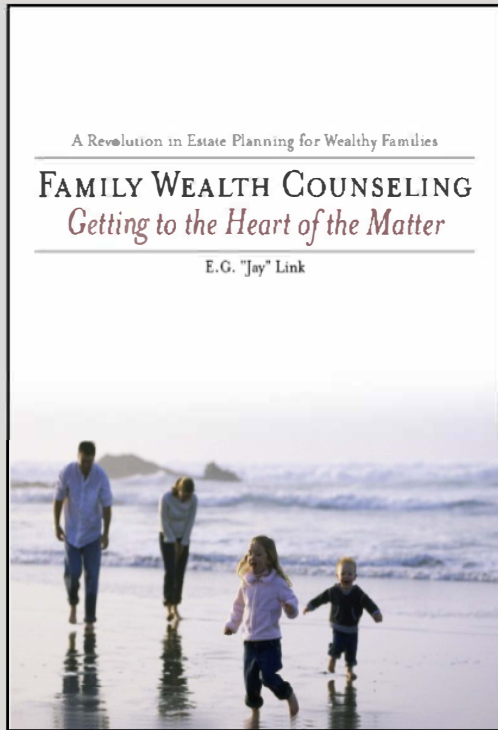
We have fully disclosed to our heirs all the details of our inheritance plans for them, and as a family we are all in full support of the overall plan.

Not at All

Perfect

1...2...3...4...5...6...7...8...9...10





Chapter 13

Building a Strong Family Tree: A Lasting Legacy for Future Generations



Evaluation #3

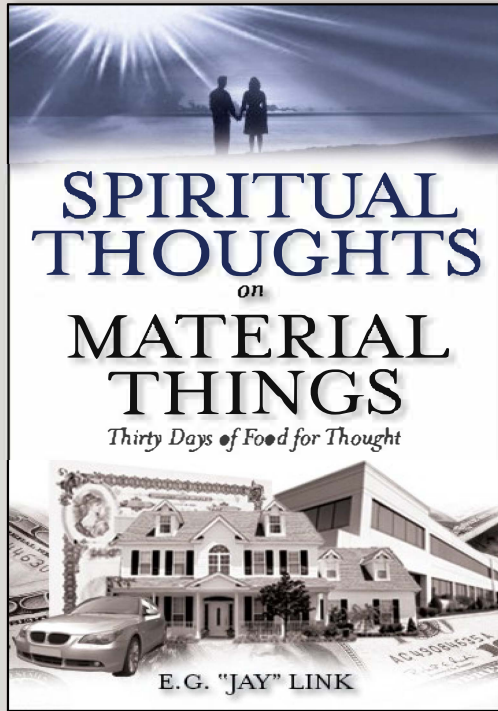
Our heirs are fully prepared spiritually, emotionally, and financially to receive the inheritance we have determined is appropriate for them. It will bless and not curse them.

Not at All

Perfect

1...2...3...4...5...6...7...8...9...10





Chapter 29: Inheritances: Oh What To Do?



Evaluation #4

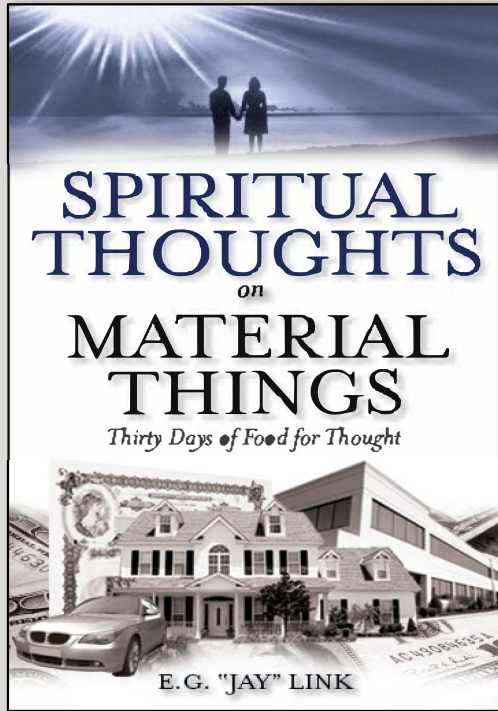
**Our heirs are fully prepared to continue
our Kingdom giving legacy after we are gone.**

Not at All

Perfect

1...2...3...4...5...6...7...8...9...10





Chapter 12: Preparing Your Heirs For Their Inheritance



Evaluation #5

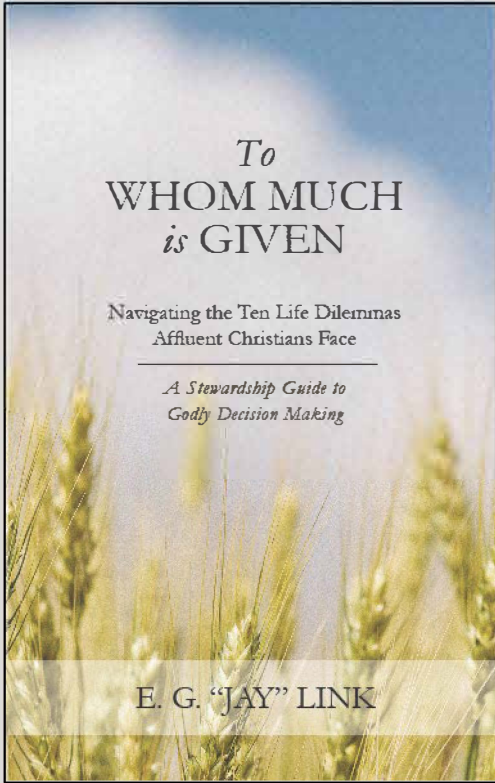
**Our stewardship plan minimizes or eliminates incomes,
capital gain, and estate taxes.**

Not at All

Perfect

1...2...3...4...5...6...7...8...9...10





Chapter 6: How I Can Best Render Unto Caesar and Unto God



Evaluation #6

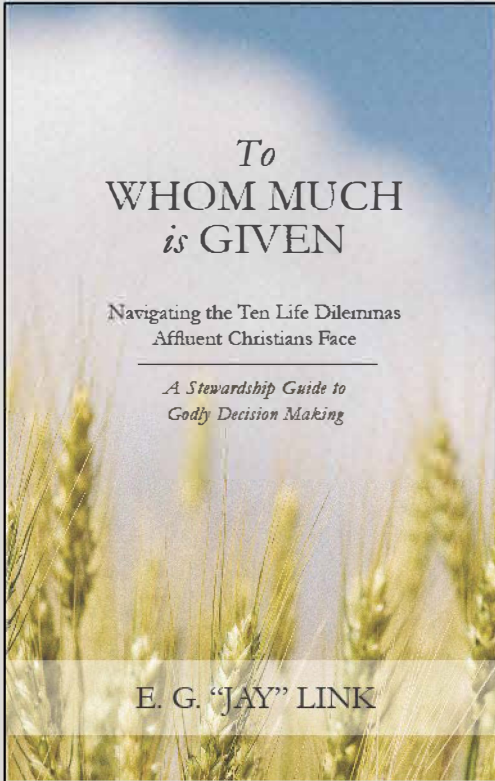
Our current plan provides for maximum Kingdom impact during our life time and after we eternally relocate.

Not at All

Perfect

1...2...3...4...5...6...7...8...9...10





Chapter 9: Having a Master Giving Strategy



Evaluation #7

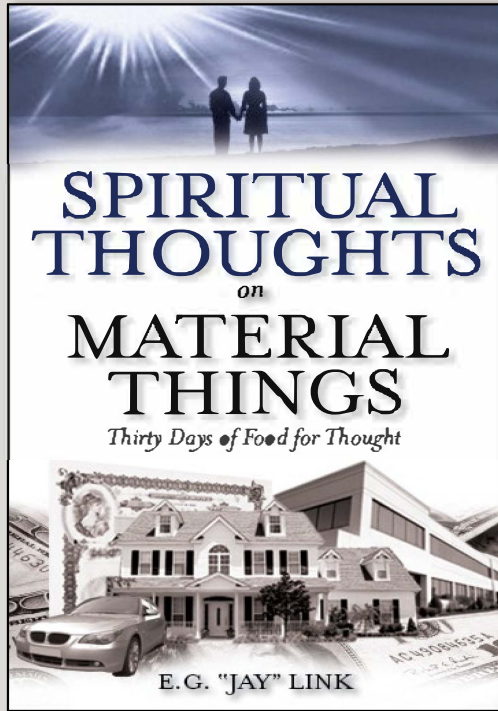
Our advisors are both highly skilled at their professions as well as committed Christians who are counseling us with biblical wisdom within the context of a Christian worldview.

Not at All

Perfect

1...2...3...4...5...6...7...8...9...10





Chapter 23: Are Your Advisors Asking You the Right Questions?



Evaluation #8

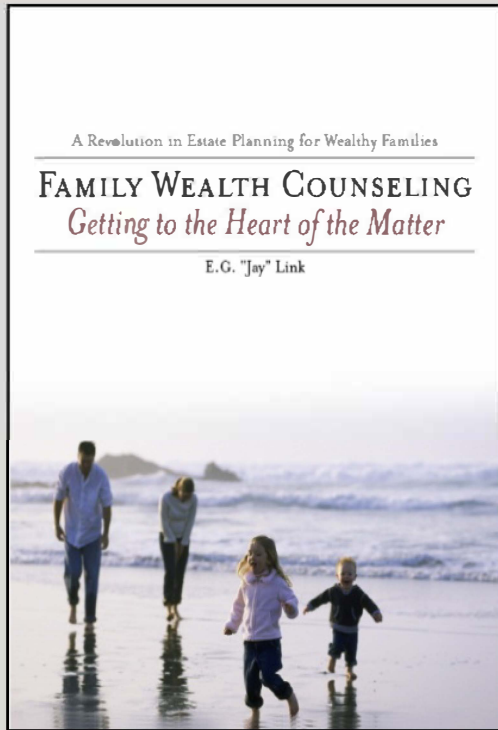
**All our professional advisors work together
as an efficient and unified planning team
to achieve the best possible planning outcomes for us.**

Not at All

Perfect

1...2...3...4...5...6...7...8...9...10





Chapter 15

Assembling an Effective Planning Team



Evaluation #9

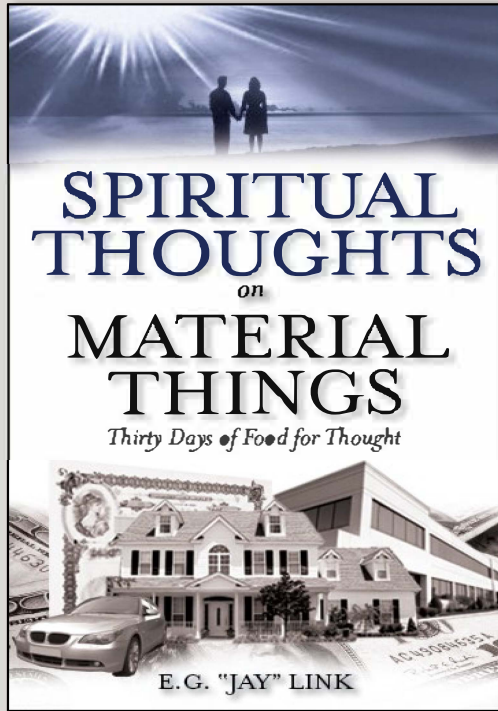
**We have discovered our “Fire Within”
allowing us to fully utilize our God-given passions
and talents for a God-given purpose.**

Not at All

Perfect

1...2...3...4...5...6...7...8...9...10





Chapter 19: Discovering Your Fire Within



Evaluation #10

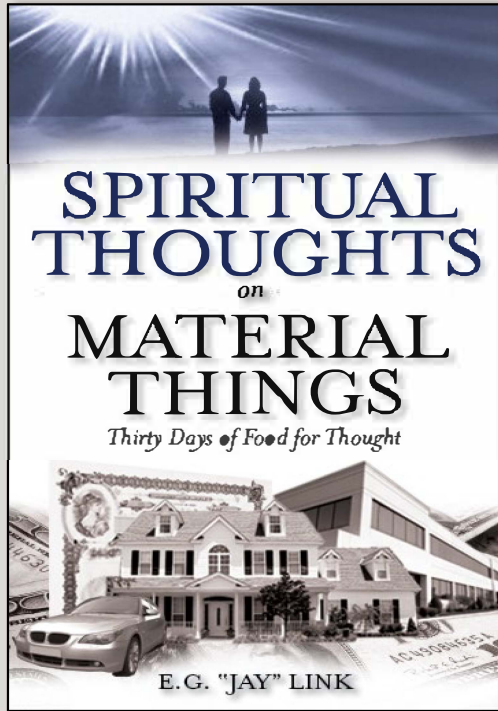
**Understanding that God owns all we have,
we have drawn a financial finish line for how much is enough
for our lifestyle and our net worth.**

Not at All

Perfect

1...2...3...4...5...6...7...8...9...10





Chapter 26: How Much is Enough?



Your Planning Evaluation



Your Planning Evaluation

0-50

You need to get serious about planning!



Your Planning Evaluation

0-50

You need to get serious about planning!

51-70

You are like most affluent families. You have done some good planning, but a lot of additional work still needs to be done.



Your Planning Evaluation

- 0-50** **You need to get serious about planning!**
- 51-70** **You are like most affluent families. You have done some good planning, but a lot of additional work still needs to be done.**
- 71-85** **You are well on your way. Creative fine tuning will help optimize your planning outcomes.**



Your Planning Evaluation

- 0-50** **You need to get serious about planning!**
- 51-70** **You are like most affluent families. You have done some good planning, but a lot of additional work still needs to be done.**
- 71-85** **You are well on your way. Creative fine tuning will help optimize your planning outcomes.**
- 86-100** **You should write a book and start teaching others. Great job!**



**Notice, how many of the 10 items on the checklist
are “soft” planning issues
and how many are “hard” planning issues?**



**Notice, how many of the 10 items on the checklist
are “soft” planning issues
and how many are “hard” planning issues?**

7 – Soft

3 – Hard



**Notice, how many of the 10 items on the checklist
are “soft” planning issues
and how many are “hard” planning issues?**

7 – Soft

3 – Hard

In marketing, focus on the soft issues!

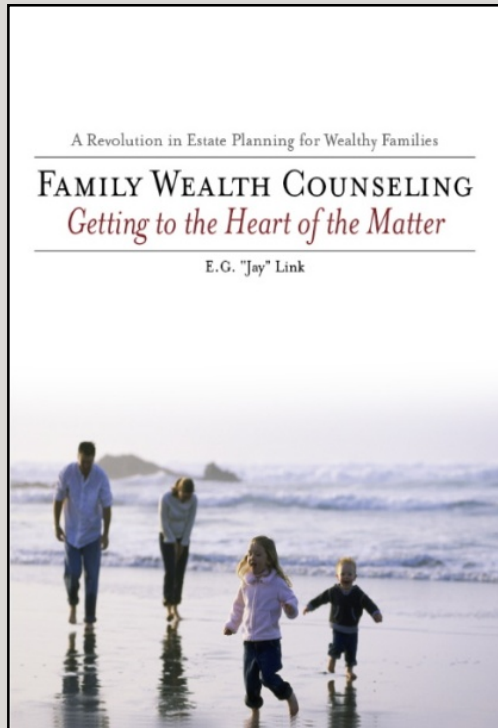


Effective Use of Critical Mental Angles in Marketing Your Planning Services

“Critical Mental Angle”

A statement or assertion that is contrary to a person’s current knowledge or understanding, yet is something that person wants to believe is true.”





Chapter 3

Processing Critical Mental Angles

Learning to Think Beyond...



Effective Use of *Critical Mental Angle* in Marketing Your Planning Services



Effective Use of *Critical Mental Angle* in Marketing Your Planning Services

Examples of Critical Mental Angles

- I. Estate, capital gains and gift taxes are all optional.



Effective Use of *Critical Mental Angle* in Marketing Your Planning Services

Examples of Critical Mental Angles

1. Estate, capital gains and gift taxes are all optional.
2. You can give these taxes away to charity.



Effective Use of *Critical Mental Angle* in Marketing Your Planning Services

Examples of Critical Mental Angles

1. Estate, capital gains and gift taxes are all optional.
2. You can give these taxes away to charity.
3. Giving can be financially profitable to you and your family.



Effective Use of *Critical Mental Angle* in Marketing Your Planning Services

Examples of Critical Mental Angles

1. Estate, capital gains and gift taxes are all optional.
2. You can give these taxes away to charity.
3. Giving can be financially profitable to you and your family.
4. There are ways to both give and keep and the same time.



The Wrong Way to Process Critical Mental Angles



The Wrong Way to Process Critical Mental Angles

Rule #1: Do not reject a *Critical Mental Angle*
Simply Because It Seems Too Good to be True.



The Wrong Way to Process Critical Mental Angles

Rule #1: Do not reject a *Critical Mental Angle*
Simply Because It Seems Too Good to be True.

Rule #2: Do not Reject a *Critical Mental Angle*
Simply Because You Did Not Think of It.



The Wrong Way to Process Critical Mental Angles

Rule #1: Do not reject a *Critical Mental Angle*
Simply Because It Seems Too Good to be True.

Rule #2: Do not Reject a *Critical Mental Angle*
Simply Because You Did Not Think of It.

Rule #3: Do not Reject a *Critical Mental Angle*
by Passing the Decision-Making Responsibility
to Someone Else.



Questions and Answers

