(SPP) MARKETING A STEWARDSHIP PLANNING PRACTICE

(All course titles are available ON-DEMAND.)

(SPP 100) The Biblical Basis for Stewardship and Generosity
This course offers a comprehensive review of the Old and New Testaments, highlighting the Scriptures that focus on stewardship generally and giving specifically. We cover over 400 verses in this class.
(SPP 200) How to Work With Your Clients' Other Professional Advisors
Successful implementation of your planning recommendations depends on your ability to work effectively with a client's other advisors. Learn how to build a high-trust/high-performing team of advisors.
(SPP 300) Becoming Your Client's Most Trusted Advisor Setting Yourself and Your Practice Apart in the Overcrowded Marketplace
This course unpacks "high trust" services so that clients look to you first among all their advisors. We also discuss how to create a service that is of high value and provides a unique marketing message.
(SPP 400) The Five Phase Stewardship Planning Process
The right emphasis on all five aspects of a stewardship planning process is critical to a plan's effective implementation. This course addresses how to avoid the "quicksand" of implementation.
(SPP 500) Helping a Family Evaluate Where They Are in Their Planning Learning How to Ask Critical Mental Angle Questions
Many people believe they "have it covered" when questioned about their financial plan. Learn to bypass a simple dismissal and use "critical mental angle" questions to turn "no interest" into "tell me more".
(SPP 700) A Virtues-Based Approach to Planning
There are three approaches to estate planning: a tax, values and virtues approach. This course unpacks all three and highlights why the virtues-based approach is the most effective and the most enduring.
(SPP 800) The Ten Unique Stewardship Dilemmas Affluent Christians Face
This course examines 10 unique stewardship dilemmas that affluent families face, and how to assist them in overcoming these dilemmas.