

## **(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.