

# New Advisor Onboarding

## Masterclass Catalogue

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Created by:

*Dan Hostick*

Founder



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HOSTICK CONSULTING SERVICES INC.



**A course which has proven  
to help advisors realize  
their potential.**

# Masterclass Details

- Each masterclass is educational and covers a strategy for success
- The implementation for each advisor to personalize the knowledge is covered in an interactive workbook for each masterclass
- Can be held live or virtually
- Minimum time for each masterclass is one hour

*Continue for a in-depth breakdown of what each masterclass entails.*

## **5A-B - Create A Mindset for Success**

It all starts with how you think. Learn how great advisors think and how they follow the key principles that will enable you to succeed. Your attitude will carve out the path to success that you will enjoy.

## **12A-B - The Insurance Story**

Learn how insurance works for your customers. They need to understand all types of insurance so they can build a plan for their own needs. A careful look will solidify your relationship and create a roadmap for you to navigate them as they grow through life's changes and challenges.

## **1A-B - Building A Value Proposition**

Learn how to position what you do and to build a brand in the marketplace. You need to know how you will be competing and winning against the competition and how you win. You will learn how to leverage your distribution and personal strengths to your prospects and customers.

## 9A-B - Prospecting Basics

You will learn the fundamentals of how to prospect for new clients which is necessary for you to grow your business. All practices need to grow by acquiring new clients to your base and to replace any customers lost through attrition. If you are a great prospector, you can only succeed.

## 10A-B - Referred Lead Prospecting

This is the most effective way to grow your practice. Learn how to master the art of getting people to refer you. You can build a roster of centres of influence who will provide an ongoing tap of quality referrals for you to work with.

## 23A-B - Prospecting Generator

Learn how to build lists of people to call on using a tool for you to think your way to finding great prospects. You will find out how to find people through identifying what they might want or by what they do in life.

## 14A-B - The Sales Process

Learn what a great sales process looks like and how you succeed if you follow it consistently as you grow the number of clients that you deal with. You will learn how this will not only improve your closing ratios but also be the key to your growth with unlimited referrals.

## 2A-B - Call Reluctance

Learn how to position what you do so that you do not have reluctance to talk to anybody. You will learn to see how you perform and how to improve so that you will have no boundaries to growth but rather will continue to develop into a master of connect ability.

## **17A-B - What Advisors Need To Be Successful**

You will learn the key tools, partnerships, and education that advisors need to master if they are to win in the marketplace. Leveraging your suppliers, partners and peers are very important components of your success.

## **18A-B - What Motivates Advisors**

It is all about understanding how great advisors drive their behaviour in a continuous fashion. This drive for results seems endless and will enable you to want to learn more, enter new markets and build a sustainable pattern of growth.

## **19A-B - Winning Strategies Advisors Should Consider**

Learn about 25 of the greatest strategies being used today by top advisors as they provide a foundation for growth. You will learn what they do and how to choose the ones that you feel will be most important for your success.

## **16A-B - Time Management for Advisors**

The role of an advisor is very challenging and will require many elements to be integrated into your life. That requires careful time planning but must include all elements of your personal and business life. You will learn how to make this happen through learning how to use your time effectively to deliver value in all the four key areas of your life.



## About Dan Hostick

Dan graduated with a B. Comm from McMaster University in 1971. He was very involved on campus with several organizations. He was a varsity hockey player for four years and was selected Captain of the hockey team in his final year. Dan immediately went into the insurance industry with London Life as a leading advisor, head office trainer and field regional director. His career was very accomplished as a field leader spanning 35 years with three large insurance companies. He achieved his CLU CHFC and CFP designations.

Upon retirement from his distinguished career as an advisor and field leader he has spent over the last decade consulting and coaching distribution organizations and advisors to success. He also was a partner in building software for coaches. Dan writes and delivers training programs designed to help advisors succeed and realize their potential. Many advisors and coaches have been participants in his training programs and enjoyed the benefits of these strategies.

Dan is committed to helping everyone he works with by sharing his over 50 years of experience appropriately and successfully.



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Dan Hostick  
dan.hostick@advisor21.ca  
905-244-7124  
21 Simcoe St S, Oshawa,  
ON, L1H 4G1