



Testimonials & Case Studies

Insights from the Longevity Advisor Community

Moving Powerfully Forward!

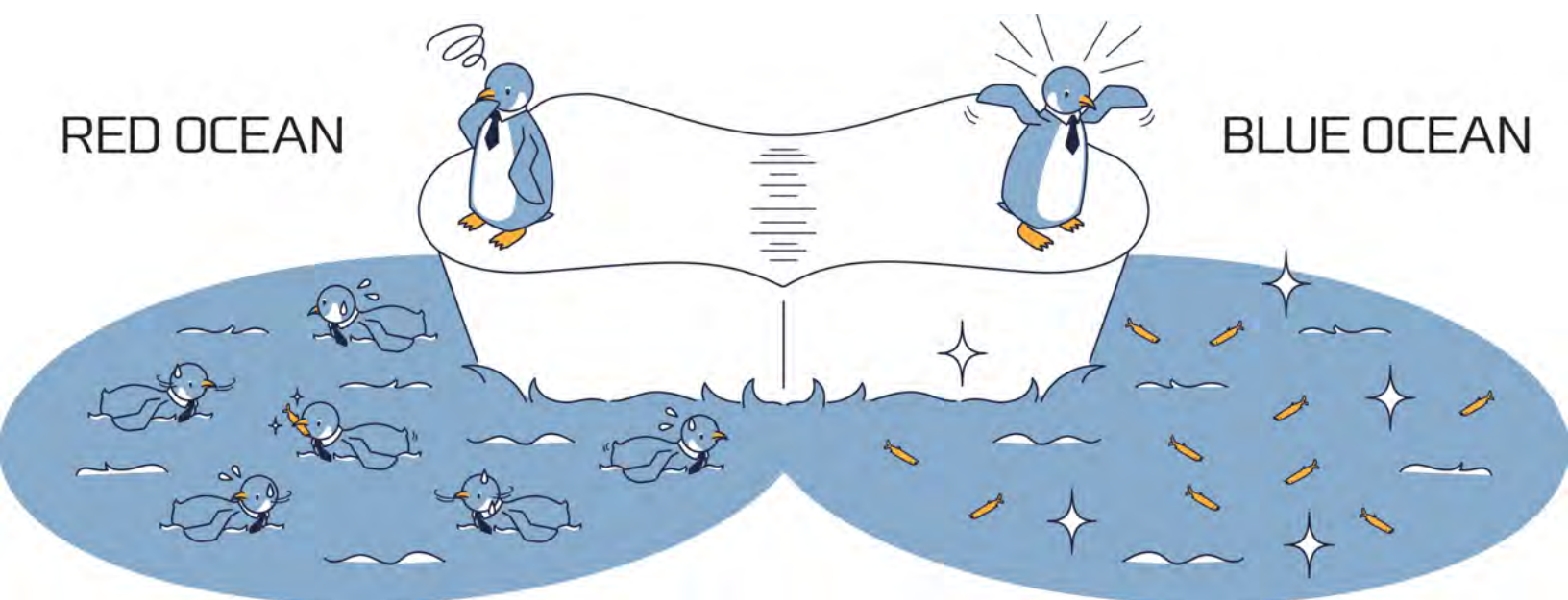
Learning from your Peers is recognized as one of the most powerful ways to accelerate your own development.

As you prepare to approach your clients and prospects with Longevity Advising, let's first review the Testimonials and Comments from members of our community along with the case studies from 3 of your Peers who have participated in the InvestInU Longevity Advising Development Program.

What would you like to be able to say about your own participation in the Program and the difference you are making with your clients and prospects?

Use these examples to help create your own inspiration and vision on what difference you can make by developing as a Longevity Advisor.

Again, take time to absorb what is here. Your own impact will be greatly enhanced by the time you take uploading these insights that you are being offered here as you build out your own muscle memory.



Advisor Testimonials:

Highlight the Words and Phrases that you would like to be most reflective of you:

- On a personal level, it has shifted my mindset, in what am I doing and why am I doing it and how am I doing it?
- I have been reinvigorated, reinventing myself for what's next.
- I am really providing an experience for the client that I didn't have access to or did not know how to tap into.
- If I don't take the time to have those conversations then I'm really replaceable.
- To access, to open up an opportunity that is sitting right under their noses that they have no idea they have. So, for me you are the key to unlocking that opportunity.
- I am not having to sell myself and reinforce my value, they are actually saying that. But I have full confidence that I know I am providing value they are not getting anywhere else.
- I realized that for me if I am able to express this better with my clients and what I've learned from this is they are really engaged.
- It's the parallel – it's not just the dialogue of their financial life, it's their personal life that is parallel with their financial life and they are connecting with me.
- It's been a very positive experience so far where we've really seen the value in it.
- It's naturally bringing into the conversation people we can be working with down the line and working towards those referrals.
- Longevity is becoming much broader.
- This could be a very cool way to increase the connectivity that we have with our client's children.
- This elevates emotional connectivity and all that goes with it.
- I think there is tremendous benefit for us, I think we will be different from elsewhere. That's what I love about it.
- I think it is the right tool to use to acquire new clients. I think it is a great tool
- I personally think this conversation totally sets us up for Financial Planning.
- I believe in Financial Advisors heads they are having the conversation, but they are really not.
- You delivered the awakening that we are able to have a conversation around a topic that we were not proficient in and now we are able to take that conversation deeper.
- This brought something very much into clarity to my own way forward, that I really appreciate.
- Taking me through the conversation of the four key issues and then being clear on the 100 versus 65. That's a mindset piece that I have to keep having.
- The days of the advisor sitting down and talking about the family for an hour and a half, that is going to go by the wayside.
- What has this delivered so far? An insight into the real need for adjusting the preset notions of retirement.
- It's a simple path to make it to a place that no-one talks about. It's like it's an undiscovered land in our industry.
- I would say this excels in helping teams to open up their eyes to the vision of longevity and the importance that plays in clients lives not only financially but moving beyond that to health and happiness then purpose and how can we assist with achieving your goals beyond just the financial one.
- I can be highly achieving and have tunnel vision and so for someone like me to be able to have something broaden that tunnel vision for me and to be able to look at how everything connects has been very impactful for me.

Case Studies: The Longevity Advisor Journey for 3 Advisors.

The next three pages are comments from 3 Advisors who have graduated from the InvestInU Longevity Advisor Program.

Highlight the Words and Phrases that you would most like to be reflective of you.

Advisor 1: 65 Y/O Certified Financial Planner.

- What is totally fun about this, in addition to the fact that it's real and it's meaningful, the totally fun piece is that I am now involved with helping invent what is going to be key for people's future.
- This has given me a new Mission. This brought something very much into clarity to my own way forward, that I really appreciate.
- This is the Longevity equivalent of Wozniak and Steve Jobs being in the garage. That's what it is. And that is the total fun side of it. They knew they were doing something big; we know we are doing something big. That's fun, flat out fun.
- Taking me through the conversation of the four key issues and then being clear on the 100 versus 65. That's a mindset piece that I have to keep having.
- Everybody is very engaged. I was very impressed with that; I've known these people for a long time but their way of being shifted.
- I think they (the clients) were responding holistically and from the heart as much as the head and that's quite different than just looking at numbers and talking about the rate of return and even planning, doing a Monte Carlo analysis where they can feel good about having a high probability of achieving their goals.
- The end result was inspirational and emotional not only for the other participants (clients) but for me as well.
- Granted, the thought leaders at the various companies are putting some things together but it's on the infirmity side not on the thriving side, and that's where most of my energy is.
- Shorter more frequent meetings – keeping the conversation going. Having follow up – 15-minute check-in.
- Let's just say in this world of financial advising, the best thing that I could give anybody is the vision of a 100+ year healthy life.

Advisor 2: Certified Divorce Financial Analyst.

- I have been looking for something different on how I work with my clients. I think this is it.
- You are giving us a platform to flex from.
- My clients have never been so engaged.
- I have a current prospect that I'm working on. I had a fantastic dialogue around longevity, this is what got them excited to work with me. After the first meeting I got an email and they said they really enjoyed this, "you opened our eyes, and we really look forward to working with you".
- I realized that for me, if I am able to express this better with my clients, what I've learned from this is they are really engaged.
- I have a deeper connection with them. I will tell you in the last 6 months my clients have become more advocates for me which I didn't have before. They were there, but this is opening the door for me to have that ongoing flow.
- I got an email from a client this morning saying, "I love this thing, I feel like we are right on track with the conversations we've had in the past, were going in the right direction". I've never had that before. I didn't get feedback before; I'm starting to get that from them.
- My own clients have friends, and they are introducing us to people. One client introduced me to her sister. My biggest client introduced me to a businessman looking at selling their business for \$17 million. That didn't happen before.
- My biggest client introduced me to a businessman who has become a \$17 million client. **Our first conversation was about Longevity, then we did the Planning and then the investments."**
- Because I am connecting at a deeper level with my current clients. It's the parallel – it's not just the dialogue of their financial life, it's their personal life that is parallel with their financial life and they are connecting with me. We rarely talk about investments in those discussions – that part comes at a much later date, and I love that, it's not threatening.
- It's been a very positive experience, where we've really seen the value in it.
- In our follow ups, what really stuck with everyone was the purpose aspect of it, we're focusing not just on longevity – diet and exercise and those things, but on what's your purpose? Everyone we talk to says that makes so much more sense. Even those who are already retired said it took me several years to figure out what do I want to do with my life because it's not over yet and I haven't planned for any of this.
- And so, to be able to take that as the starting point and then connect that over to what we can do for them, I think it is just so much more powerful than just starting with the financial side of it.
- What blows me away is the client I mentioned in their early 70s, their Mum and Dad are still alive. Would you have ever thought that 20 years ago?
- Next week xx's daughter is going to join in as well. They are crucial for the continuity of our business. This is something that what makes us stand out to what we are doing but at a deeper level.
- I feel like a year from now if we regroup, we'll have a clearer understanding of what Jonathan has built and where it's at today. I think there is tremendous benefit for us, I think we will be different from elsewhere. That's what I love about it.

Advisor 3: Portfolio Manager in a Practice of 30.

How many Advisors does this Advisor represent? A Portfolio Manager who, in their words, “I’ve always hidden behind the numbers”. Draw on the comments below and note the shift not only for them, but for one of their clients as well. These case studies demonstrate what is possible as you continue to evolve.

If you have also hidden behind the numbers, you will discover this same sense of liberation and energy.

Key Comments:

- I’ve always hidden behind the numbers, now I don’t have to, I can meet the Clients where it is important to them.
- 3 years ago, I would have called this approach “Kookie”.
- We have seen a tremendous change in them over the last year. Their confidence has grown, and they conduct themselves with more presence. (Team Leadership).
- We are just scratching the surface with this focus on Longevity Advising.
- The referral door has never been so wide open.
- We’ve always wanted to refer you but never knew how to differentiate you from the people our friends are working with. Now we can. (Client Comment).
- To deepen client relationships and to facilitate purposeful thought and development of valuable lifestyle choices.
- “She (the client) saw value in having the discussion to avoid the alternative. The conversation raises her intentionality and helps her see the alternative is not attractive (stark). Goals aren’t any good if your body cannot carry you. Get away from living through medication”.
- An insight into the real need for adjusting the preset notions of retirement.



An Introduction to Longevity Advising