



# Training Programs For Financial Professionals And Employers

## Financial Professionals

Transform your advisory practice by learning how to approach "sensitive" topics with compassion and confidence, leverage AI to create a more holistic client experience, and integrate health considerations into financial plans.

## Employers

Empower your employees and their families to successfully navigate "difficult" conversations about health, wealth, cognitive decline and help them learn how to make better healthcare and personal finance decisions.

# Table of Contents

## For Financial Professionals

- How To Talk To Clients About Their Health..... 2
- How To Talk To Clients About Cognitive Decline ..... 3
- How To Leverage AI To Improve The Client Experience..... 4
- How To Have Better Client Conversations About Health, Wealth, And Cognitive Decline..... 5
- How To Help Clients Prepare For Longevity ..... 6

## For Employees

- How To Have Better Family Conversations Around Health And Wealth ..... 7
- How To Prepare For A Physically And Financially Healthy Longevity ..... 8



## VIRTUAL CLASS



# For Financial Professionals How To Talk To Clients About Their Health

## Class Description

This session provides financial professionals with the skills and confidence to discuss health-related topics with their clients. Advisors learn how to initiate and sustain successful client discussions about health utilizing expert-informed conversation recommendations, starter scripts, and empathy.

## Key Learnings

- ✓ **Build trust:** Learn how to create a safe and supportive environment for clients to share their health concerns
- ✓ **Enhance relationships:** Build loyalty by addressing one of your client's greatest financial fears
- ✓ **Be more confident:** Raise your level of comfort and confidence when speaking with clients about their health
- ✓ **Act in your client's best interest:** Meet your responsibilities for protecting your client from all financial risks, including those caused by health events and costs
- ✓ **Grow your business:** Consolidate held-away assets, connect with the next gen, and drive organic revenue growth

## Class Overview

1. The Inevitability Of Client Health Events And Costs
2. Why Talk About Health With Your Clients
3. Techniques For Empathetic Listening And Communication
4. How To Start Conversations About Health
5. Expert-Informed Conversation Tips
6. Incorporating Health Concerns Into Financial Planning
7. Tools That Support Better Conversations
8. Q&A



For Financial Professionals

# How To Talk To Clients About Cognitive Decline

## Class Description

This training session focuses on equipping financial professionals with the skills to discuss cognitive decline with their clients. Advisors will learn how to recognize signs of cognitive decline, handle client conversations with sensitivity and empathy, and take steps to protect clients' financial, physical, and emotional well-being.

## Key Learnings

- ✓ **Recognize early signs:** Learn to identify early signs of cognitive decline in your clients
- ✓ **Build trust:** Learn how to create a safe and supportive environment for clients to share their concerns about cognitive decline
- ✓ **Personalize client engagements:** Ensure that clients feel understood as they navigate cognitive health challenges
- ✓ **Be more confident:** Raise your level of confidence when speaking with clients about cognitive decline
- ✓ **Grow your business:** Consolidate held-away assets, connect with the next gen, and drive organic revenue growth

## Class Overview

1. The Prevalence Of Cognitive Decline
2. Why Talk About Cognitive Decline With Your Clients
3. The Six Ways That Cognitive Decline Threatens Your Business
4. Recognizing Early Signs Of Cognitive Decline
5. Techniques For Empathetic Listening And Communication
6. How To Start Conversations About Cognitive Decline
7. Expert-Informed Conversation Tips
8. Strategies For Safeguarding Clients' Financial Interests
9. Tools That Support Better Conversations
10. Q&A

## VIRTUAL CLASS



# For Financial Professionals How To Leverage AI To Improve Client Conversations

## Class Description

This training session introduces financial professionals to the power of AI to improve client conversations. Participants will learn how to use and integrate AI tools, including WhealthBot and the WhealthChat virtual assistant, into your practice to facilitate more productive discussions about health, wealth, and cognitive decline.

## Key Learnings

- ✓ **Personalize the client experience:** Discover how AI empowers you to tailor conversations to each client's unique needs and circumstances
- ✓ **Enhance productivity:** Learn to use AI tools to streamline and enhance the quality of client interactions, making conversations more productive and effective
- ✓ **Plan proactively:** Utilize AI insights to anticipate client needs and address concerns proactively, fostering better planning and decision-making
- ✓ **Be more confident:** Raise your level confidence when speaking with clients, especially health-related concerns
- ✓ **Grow your business:** Consolidate held-away assets, connect with the next gen, and drive organic revenue growth

## Class Overview

1. The Impact Of AI On Client Preferences And Behaviors
2. Proactive Client Engagements With AI
3. How To Use A Virtual Assistant To Facilitate Client Conversations (WhealthChat)
4. How To Use Assessments And Calculators As Conversation Starters (WhealthBot)
5. Integrating WhealthBot And WhealthChat Into Your Practice
6. Q&A

## IN-PERSON CLASS



# For Financial Professionals

## How To Have Better Client Conversations About Health, Wealth, And Cognitive Decline

### Class Description

This session provides financial professionals with the skills and confidence to discuss “sensitive” topics with their clients. Advisors learn how to initiate and sustain client discussions about health, wealth, and cognitive decline utilizing expert-informed conversation recommendations, starter scripts, and empathy.

### Key Learnings

- ✓ **Build trust:** Learn how to create a safe and supportive environment for clients to discuss “difficult” topics
- ✓ **Enhance relationships:** Build loyalty by showing your clients that you understand them
- ✓ **Be more confident:** Raise your level of comfort and confidence when speaking with clients about topics at the intersection of health, wealth, and cognitive decline
- ✓ **Grow your business:** Consolidate held-away assets, connect with the next gen, and drive organic revenue growth by creating a more personalized and intimate client experience

### Class Overview

1. The Inevitability Of Client Health Events And Costs
2. Why Talk About Health and Cognitive Decline With Your Clients
3. Techniques For Empathetic Listening And Communication
4. How To Start “Difficult” Client Conversations
5. Expert-Informed Conversation Tips And Scripts
6. Incorporating Health Concerns Into Your Financial Plans
7. AI Tools That Support Better Conversations
8. Q&A

## IN-PERSON CLASS



# For Financial Professionals How To Help Clients Prepare For A Successful Longevity

## Class Description

This session provides financial professionals with an introduction to the Seven Components of A Successful Longevity Plan. It is designed to empower professionals help their clients prepare for the health and longevity-related risks that pose the greatest threats to their financial security, physical and behavioral well-being, and legacy.

## Key Learnings

- ✓ **The seven components:** Learn about the seven components of a successful longevity plan
- ✓ **Deliver more holistic services:** Enhance your understanding of the financial consequences of health and longevity-related risks and how to help clients manage and mitigate them
- ✓ **Be more confident:** Raise your level of comfort and confidence when speaking with clients about health and longevity-related risks
- ✓ **Grow your business:** Consolidate held-away assets, connect with the next gen, and drive organic revenue growth by creating a more personalize and intimate client experience

## Class Overview

1. Introduction to the Seven Components
2. The Foundational Pillars of Longevity Planning
3. Longevity By The Numbers
4. The Threat Of Health And Longevity Risks
5. Detailed Presentation of the Seven Components
6. How To Operationalize Longevity Plans
7. How To Have Better Client Conversations About Health and Longevity
8. How To Leverage AI Tools When Implementing Longevity Plans
9. Q&A



For Employees

## How To Have Better Family Conversations Around Health And Wealth

### Class Description

This training session is designed to help employees initiate and sustain productive family conversations around health and wealth. Participants will learn strategies to guide their families through discussions about health and healthcare planning, financial management, and cognitive decline, ensuring that family members are aligned and prepared for the future.

### Key Learnings

- ✓ **Enhanced communication:** Gain techniques to foster open, honest, and empathetic family discussions about health and wealth
- ✓ **Increased comfort:** Learn how to manage health and wealth challenges with greater openness and confidence
- ✓ **Strengthened family bonds:** Build stronger family relationships by navigating complex family dynamics and decision-making processes together
- ✓ **Lower stress and anxiety:** Reduce stress levels when having family conversations on “difficult” subjects and making difficult decisions relating to health and wealth

### Class Overview

1. The Inevitability Of Family Health Events
2. The Importance of Open Conversations About Health, Wealth, and Cognitive Decline
3. Techniques For Empathetic Listening And Communication
4. How To Start “Difficult” Family Conversations
5. Expert-Informed Conversation Tips And Scripts
6. Incorporating Health Concerns Into Your Financial Plans
7. AI Tools That Support Better Conversations
8. Q&A





For Employees

# How To Prepare For A Physically And Financially Healthy Longevity

## Class Description

This training sessions introduces a new longevity planning framework. It is grounded in the assumption that for most adults, health and wealth cannot be separated. It empowers individuals and families to prepare for the health and longevity-related risks, including cognitive decline, that pose the greatest threats to their financial and emotional security.

## Key Learnings

- ✓ **The seven components:** Learn about the seven components of a successful longevity plan
- ✓ **Make better decisions:** Learn how to effectively identify, manage, and mitigate health and longevity-related financial risks
- ✓ **Have better conversations:** Raise your level of confidence when speaking with family members about topics at the intersection of health, wealth, and cognitive decline
- ✓ **Make better plans:** Learn how to proactively plan for inevitable family health events
- ✓ **Lower stress and anxiety:** Reduce stress levels by taking greater control of your health and financial futures

## Class Overview

1. Introduction to the Seven Components
2. The Foundational Pillars of Longevity Planning
3. Longevity By The Numbers
4. The Threat Of Health And Longevity Risks
5. Detailed Presentation of the Seven Components
6. How To Operationalize Longevity Plans
7. How To Have Better Conversations About Health and Longevity
8. How To Leverage AI Tools When Implementing Longevity Plans
9. Q&A



**Chris Heye, PhD, Founder and CEO**

# **WhealthBot**

**Your AI-Powered Personal Health and Wealth Coach**