

Generate Prospects, Gain Trust, And Grow Your Business with TurnKey Educational Workshops

One of the biggest challenges for financial advisors is a strong pipeline that consists of now and future buyers. The key to reaching the future buyer is to provide educational content that they are searching for. Adding financial workshops to your current marketing programs – dinner seminars, digital marketing, webinars – is a home run. It will establish you a thought leader, increase your reach, and promote your brand. The best part – both of LeadingResponse's Financial Workshop Solutions are turnkey!



Expand your reach with Financial Educational Workshops. With LeadingResponse, you have choices.

LeadingResponse offers financial advisors two choices: Non-Profit and Direct.

LeadingResponse's Non-Profit Educational Workshop

Our Non-Profit Financial Educational Workshop offers financial advisors the ability to choose from a variety of topics that they would like to present. The best part: all content has been created. Advisors just need to pick their topic, schedule their dates, and book a venue.

Solution benefits include:

Becoming a trusted instructor.



Guide consumers through the building blocks of retirement. How? With a series of 30-60 minute live educational workshops held at local libraries or even as a webinar.

Meeting more consumers.



These workshops connect you with consumers where they are, delivering quality content in concise form with relevant content based on where they are in the retirement planning journey.

Customized planning.



Cover what your prospects need to know. Are your attendees rounding the corner into retirement? Provide an informative sound bite on what to expect with Social Security. Is a prospect crossed the threshold of 65 years of age? Deliver a topic-specific tutorial on Medicare.

Amplifying your credibility.



Instill a sense of trust with your workshops. All financial advisors participating in the program are required to operate under the AFEA (American Financial Education Alliance) brand and within the non-profit processes.

No more expensive cost of food or other incentives.



Your consumers are here to learn relevant information regarding their financial health and future, and hear it from the industry leader.

Plug-and-play presentations and follow up material.



All the hard work has been done for you. All you have to do is win over clients.



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LeadingResponse's Direct Financial Educational Workshop

Our Direct Educational Workshop solution offers financial advisors the ability to offer a two-day consumer-focused retirement course. We recommend that you hold the workshop at a local university or community college, the 5-hour course curriculum is broken into two evening sessions, allowing you ample time to educate and build the confidence prospects need to engage for financial guidance afterwards.

Solution benefits include:

No more expensive annual fees to purchase a "territory."



No more expensive annual fees to purchase a "territory." It's your backyard, why should you have to pay to host classes in it?

"Always on" marketing helps generate more consistent course enrollment.



Utilizing direct mail and digital marketing channels, workshop registrations can be made year-round.

Hands-on coaching and support are a game-changer.



Cover what your prospects Gain access to step-by-step video training, interactive webinars, and private coaching sessions.

Eliminating expensive cost of food or other incentives.



Your consumers are here to learn advanced financial information from the industry leader. So there's no need to lure them in with a nice meal.

Becoming an industry leader.



Guide consumers through complex financial decisions with multi-evening, in-depth curriculum that addresses their needs.



To learn more about LeadingResponse's Financial Educational Workshops and which one is the better fit for you, give our marketing team a call at (888) 907-3971 today. Remember, the secret to getting ahead is getting started!

Ready to get started?

Visit us at go.leadingresponse.com/fin-educational-workshops.html or call us at 888.907.3971 for more information



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