



Referral & Productivity Coaching for Financial Advisors

www.ProductivityUncorked.com



Coaching to make more money and get more done

Does this sound familiar?

- I'm tired of clients telling me how much they love me but never refer me.
- I'm uncomfortable asking for referrals. I never know what to say.
- I'm frustrated with my COIs. They never refer me as much as I refer them.
- I am overwhelmed. My head is swirling with too many priorities.
- I get buried before my first cup of coffee. I never get anything done.
- I have so many distractions in my day, it drives me crazy!

Successful financial advisors want more client and COI referrals, more AUM, more focus and more control of their life and practice. They crave more productivity in their day. At Productivity Uncorked, we get our clients beyond what's holding them back.

Private Coaching for Financial Advisors

Our private coaching is like having your own fitness coach in your home. You get individual attention, work out harder than you ever would on your own and achieve greater results than you ever thought you could. Together, we leverage your personal strengths and tackle your barriers and goals to **UNCORK** your referral and day to day productivity.

"Working with Michelle and Patty has revolutionized my business. A year and half into my coaching relationship and my revenue has increased 40%!"

Susan (California)

Private Coaching for Team Managers

"Your ability to help me navigate the conversations with my team has been extraordinary."

Branch Manager at UBS

Our private coaching for team managers is like having a sounding board that actually speaks to you as well. We listen and respond with understanding to offer professional insight that's meaningful and spot on. We know what you're up against. We'll give you unfiltered advice on how to manage the strong personalities on your team to help you reach your goals.

Group Coaching for Female Advisors

As a female advisor, doing things a man's way is good for men but not always good for women. This program is twelve sessions and is based on our Amazon Best Selling book, **A Woman's Way**. Work through six productivity sessions and six referral sessions to reset your practice and do a productivity 180!

"80% of advisors have no referral strategy or if they do it's unfocused and inconsistent."

A Horsesmouth Study

"Only 13% of advisors feel in complete control of their time."

FPA Research



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