

# Halftime 1:1 Coaching Services



*If you're serious* about strengthening client relationships and helping clients lead lives of purpose and impact, we encourage you to make **Halftime Coaching Services** a part of your service offering

**Financial products and services are commodities in clients' minds. The strength of the advisor-client relationship is the key to client retention.**

## **How do you strengthen client relationships?**

By adding value to life challenges as effectively as you add value to financial challenges. The trained and experienced coaches at Halftime can be your partner in making this happen.

## **Our Coaches**

They are expert in helping individuals transition from success to significance. We use a series of tools, assessments, and 1:1 conversations to help your clients define their talents, dreams and passions and build a plan for moving forward. As their advisor, you can then architect the financial strategy to support that life of purpose and impact. The typical Halftime coaching engagement involves 4-6 coaching sessions over the course of 3-5 months.

## **Our Commitment**

Our coaches know how to respect and protect the client relationships you have worked so hard to nurture over the years. Since you are our primary customer, we keep you in the loop every step of the way-- staying as accountable to you and your goals as we are to the client we are helping on your behalf. It's your relationship-- we're just trying to strengthen it by helping clients envision, pursue and attain a second half of significance.

**For more information:** Please contact Ed Kerns at [ed.kerns@halftime.org](mailto:ed.kerns@halftime.org) or 404.242.1109