

# TIPS FOR ADVISORS

## Integrating the Willing Wisdom Index™ Into Your Business

The following are a few tips on how to make the Willing Wisdom Index™ more visible within your day-to-day business.



1

**Email Signature:** Include your Willing Wisdom Index™ Number in your email auto-signature. It's a great way to create curiosity about the Index and introduce the tool to reinforce your brand as a family focused advisor.

2

**Team Score:** Consider promoting to your clients that everyone in your firm has a Willing Wisdom Index score of 75 or higher. This speaks volume to clients and prospects that you take estate planning seriously.

3

**Share Your Report:** Send clients and prospects a copy of your own Willing Wisdom Index™ results to emphasize the point that you too are working to improve your own estate plan. This says to your client or prospect that you are no different than them and willing to share your own personal estate planning challenges. This is where you earn credibility; trust and respect when it comes to helping families begin their own important conversations about wealth transfers.

4

**Piggyback the Code:** Distribute your Willing Wisdom Index™ access codes in printed form, for example inserted in a copy of the book Willing Wisdom. The book is designed to help a client or prospect begin thinking about their estate plan and working with an advisor to implement their plans. Or, include the code whenever you send a Thank You card to a client or prospect. Be creative, but make sure that the code is highlighted so that it doesn't get missed.

5

**Cover Everyone:** Offer to share additional access codes with spouses and other family members. A family that shares and compares their Willing Wisdom Index™ Reports is an effective and entertaining way to begin family meetings.

6

**Emphasize the Value:** When sharing a code with a client or prospect or offering to provide extra codes to family members, remember to emphasize that the cost of purchasing a single access coded is \$199.95