

A photograph of two chimpanzees dressed in formal business attire. The chimpanzee on the left wears a grey suit jacket over a white shirt with a floral pattern and a dark tie. The chimpanzee on the right wears a dark suit jacket over a pink and white striped shirt and a patterned tie. Both are wearing dark sunglasses. The background is dark and out of focus.

# ADVISOR EVOLUTION

## TRAINING SYLLABUS

2024  
FINAL

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HOW IT  
WORKS

# OVERVIEW

This training program is structured around five essential books, each focusing on a critical aspect of financial planning and therapy. Participants will engage with these texts over the course of the program, gaining in-depth knowledge and practical skills. The books are:

1. Financial Therapy Unveiled
2. Mastering Communication in Financial Therapy
3. The Blueprint
4. Mastering the Art of Retirement Income Planning
5. Risk Management in Financial Planning

## Weekly Structure

- **Reading Assignment:** Each week, participants are assigned a specific chapter from one of the books. This reading forms the basis of that week's training sessions.
- **Monday's Training Session:** Every Monday, we gather to discuss the week's reading material. This session is designed to dissect, understand, and apply the concepts from the chapter. It's an opportunity for participants to clarify doubts, exchange views, and explore the practical implications of the material.
- **Friday's Training Session:** The week concludes with a Friday session focused on reflection and discussion. This session revolves around the discussion and reflection questions provided at the end of each chapter. It's a chance to delve deeper into the material, share personal insights, and connect theory with practice.

## Socratic Method

- The training sessions are conducted in a Socratic manner. This approach encourages critical thinking and lively discussion. Participants are expected to actively engage, presenting their viewpoints, challenging ideas, and contributing to a dynamic learning environment.



# OVERVIEW

## Participant Expectations

- **Preparation:** Participants are expected to come to each session having thoroughly read the assigned chapter. This ensures meaningful contributions and a richer training experience.
- **Engagement:** Active participation is key. Attendees should be ready to discuss, question, and reflect on the material, both in the context of the group and in relation to their own experiences.
- **Openness:** The Socratic method thrives on diverse perspectives. Participants are encouraged to be open to different viewpoints and to respectfully challenge and be challenged in their ideas.
- **Reflection:** Apart from the discussions, self-reflection on the material and its relevance to one's own practice is encouraged. This helps in internalizing the concepts and applying them effectively.

## Additional Information

- **Schedule and Location:** The schedule and location of the training sessions have been provided in the calendar invite you.
- **Resources:** Additional resources, including supplementary reading materials and online forums for discussion, will be made available to enrich the learning experience.
- **Feedback and Evaluation:** Regular feedback sessions will be held to gauge progress and to tailor the program to the evolving needs of the participants.
- **Certificate of Completion:** Upon successfully completing the program, participants will receive a certificate, acknowledging their dedication and understanding of the material.

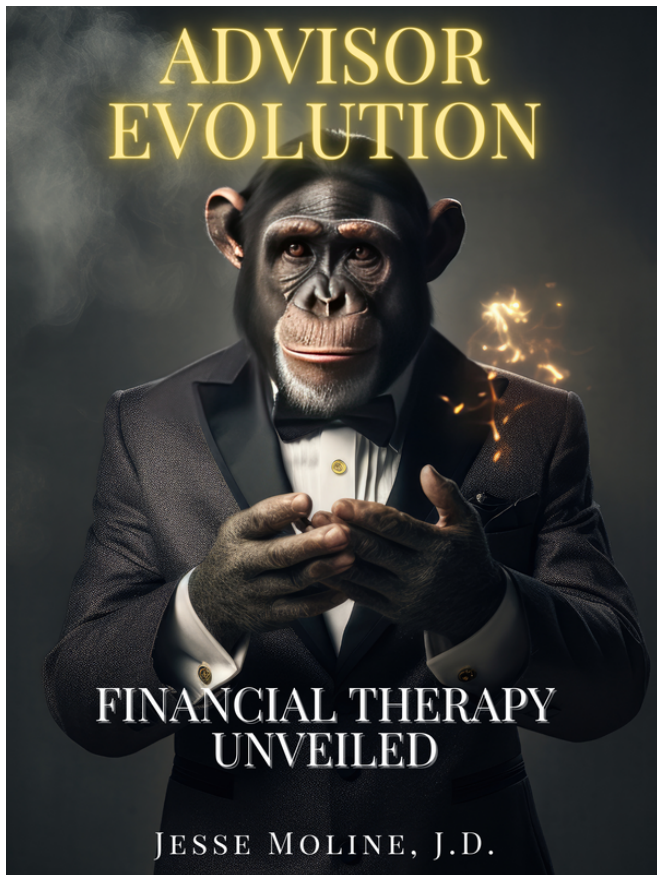
This program is not just a learning journey but a collaborative exploration of the nuances of financial therapy and planning. Your active participation will enrich not only your own understanding but also that of your peers.

A chimpanzee with a grey beard and intense orange eyes is dressed in a dark blue suit, white shirt, and patterned tie. It wears brown leather suspenders and holds two large stacks of old, thick books with both hands. The background is dark with some light specks.

# THE BOOKS



# FINANCIAL THERAPY UNVEILED



In a financial world dominated by sales targets and product-centric advice, "Advisor Evolution: Financial Therapy Unveiled" emerges as a trailblazing guide, steering the industry towards a profound transformation. This book is an indispensable resource for financial professionals seeking to transcend traditional advising methods and embrace a more holistic, client-centered approach.

This book introduces the concept of financial therapy, blending the precision of financial planning with the empathy and insight of psychological counseling. It challenges the outdated transactional models, advocating for a paradigm shift towards understanding clients' emotional and psychological ties to money.

Structured in three compelling parts, the book navigates through the evolving landscape of financial advising:

**Part I: Evolving Paradigms:** Delve into the limitations of traditional financial advising and witness the birth of a new, empathetic approach that places client relationships at the forefront.

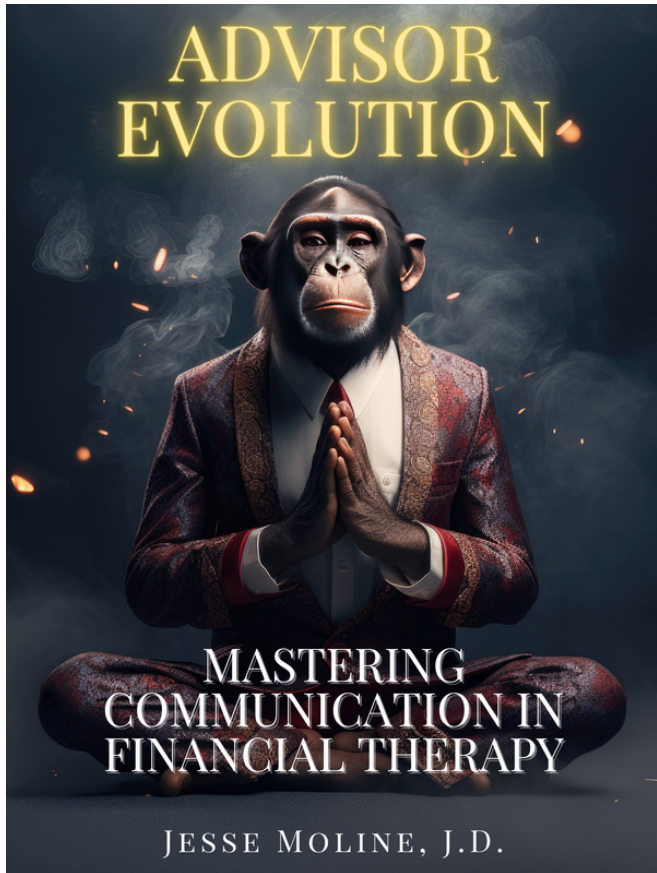
**Part II: The Empowerment Journey:** Learn how to empower clients through motivational interviewing, guiding them through the Stages of Change towards lasting financial well-being.

**Part III: Mastering the Intangibles:** Explore the subtle arts of non-verbal communication, authenticity in client interactions, and the critical role of advocacy, reshaping the advisor-client dynamic.

Each chapter of "Advisor Evolution: Financial Therapy Unveiled" is infused with practical insights, case studies, and strategies, making it a pragmatic tool for any financial advisor ready to embark on this transformative journey. It's not just about advising; it's about empowering, understanding, and evolving with your clients.

Join the evolution and redefine the essence of financial advising.

# MASTERING COMMUNICATION



An essential guide that explores the transformative role of effective communication within financial therapy. It emphasizes how nuanced communication can reshape interactions between financial advisors and clients, fostering collaboration and empathy. The book thoroughly examines strategic communication techniques that significantly enhance client-advisor relationships and promote sustainable financial health.

Detailed chapters and practical examples demonstrate how tailored communication approaches can lead to more productive and satisfying engagements. Professionals learn to build stronger relationships, supporting clients' financial goals while addressing emotional and psychological needs, thus ensuring long-term stability and satisfaction.

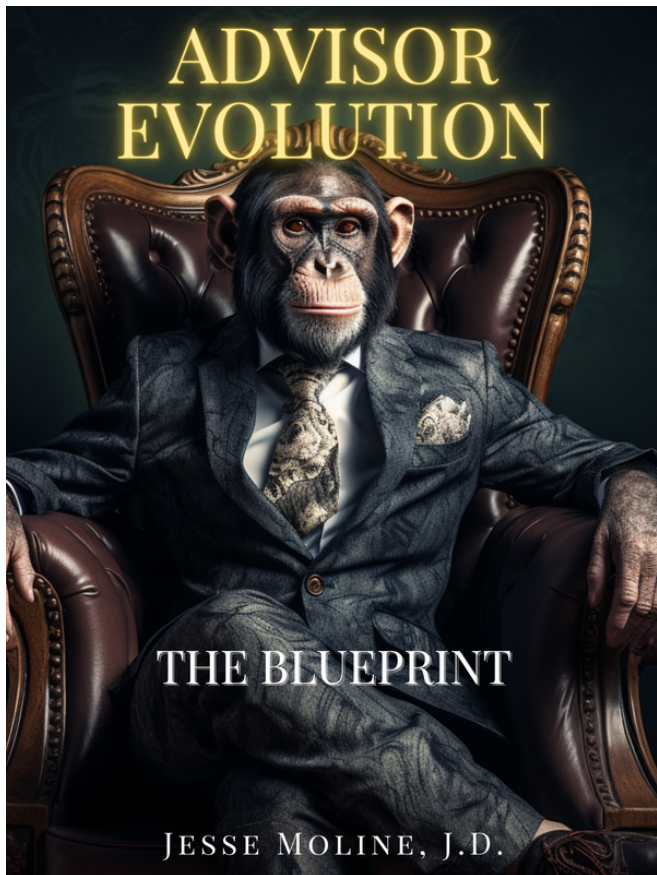
Structured in four detailed parts, the book systematically guides readers from fundamental self-awareness to sophisticated interaction techniques. It begins by emphasizing the importance of advisors understanding their own biases and emotional triggers to better serve their clients. This foundational knowledge supports the exploration of core communication skills such as active listening, recognizing diverse communication styles, and mastering empathy, each supplemented with practical strategies, real-life applications, and insightful case studies.

Progressing further, the text introduces readers to advanced techniques including motivational interviewing and empowering clients through indirect communication approaches, culminating with methods that enhance client engagement and integrate these skills seamlessly into the daily practices of financial therapists.

"Advisor Evolution: Mastering Communication in Financial Therapy" transcends the typical manual format to redefine the foundational principles of interaction between financial advisors and their clients. It is crucial for professionals who aim to transition from traditional financial advising towards a more holistic, therapeutic approach that fully considers a client's emotional and financial well-being.



# THE BLUEPRINT



A seminal guide that heralds a transformative approach in the financial advisory sphere, shifting the paradigm from product-centric sales tactics to a client-centric, relationship-focused methodology. This book provides a comprehensive framework for advisors, urging them to integrate the Stages of Change Model and Motivational Interviewing into their practice, thereby fostering deeper connections and more successful client outcomes.

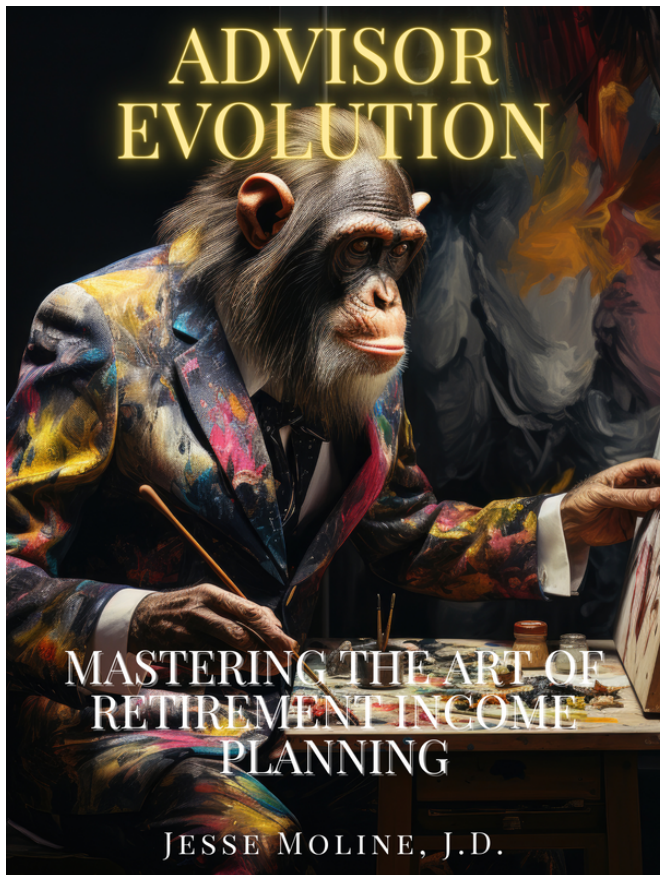
At the crux of this transformation is the necessity to comprehend the intricate relationship between a client's financial behaviors and their emotional and psychological makeup. The book underscores the importance of recognizing and responding to these factors, steering away from transactional interactions towards meaningful and empathetic engagement.

"Advisor Evolution" articulates a step-by-step journey through the stages of financial therapy, empowering advisors to evolve from transactional agents into empathetic and strategic partners. Chapters of the book unfold essential techniques and tools for advisors, equipping them to address the nuances of accumulation, distribution, risk management, and more, with a sensitivity that honors the emotional dimensions of money management.

Regular reviews and adaptability in financial planning are highlighted as crucial aspects of the process, serving as touchpoints for re-engaging and re-assessing client needs. The guide is positioned as more than a strategic manual; it is a manifesto calling for continuous improvement, adaptability, and the development of a growth mindset among advisors.

In essence, "Advisor Evolution: The Blueprint" proposes a holistic advisory approach, laying the groundwork for practices that achieve financial goals while also supporting the overall well-being and satisfaction of clients. The book acts as a first step for advisors toward becoming modern-era professionals who are as skilled in communication and empathy as they are in financial planning. Through this evolution, advisors are envisioned not only to enhance their practices but also to enrich the lives of those they serve, reflecting a commitment to the financial and emotional journeys of their clients.

# RETIREMENT INCOME PLANNING



In "Advisor Evolution: Mastering the Art of Retirement Income Planning," the realm of retirement income planning is unraveled, marking a fusion between time-tested strategies and modern-day innovative approaches. This meticulously crafted guide is tailored for financial advisors keen on refining their practice to meet the evolving demands of retirement planning in a dynamic financial landscape.

The narrative commences with a retrospect on the history of retirement planning, laying a solid foundation for understanding the transformative journey from traditional to modern strategies. The ensuing chapters delve into the intricate nuances of accumulation versus distribution, unveiling how these distinct yet intertwined facets shape the retirement income landscape.

At the heart of this exploration lies a profound exposition on Whole Life Insurance, championed as a game-changing buffer asset. Its multifaceted roles are intricately explored—from a dependable shield against market volatility to a legacy creation tool—providing advisors with a robust framework for elevating their practice.

As the narrative unfolds, it fosters a forward-thinking ethos, inspiring advisors to embrace a mindset of continuous evolution. It propels them into a realm of critical thinking, adaptability, and proactive engagement with contemporary strategies that resonate with the modern retiree's aspirations and financial realities.

This book is laden with actionable insights, real-world examples, and a plethora of strategies tailored to navigate the complexities of today's retirement income planning. The final chapters culminate in a call for advisors to take the helm of this evolutionary journey, integrating both the traditional wisdom and the innovative strategies unveiled in the preceding chapters.

Embark on this enlightening expedition, elevate your advisory practice, and become a harbinger of a new era in retirement income planning.



# RISK MANAGEMENT



In "Advisor Evolution: Risk Management in Financial Planning," financial professionals are provided a compass to navigate the modern landscape of financial advisory. This book serves as a resource to enhance skills and knowledge, leading advisors towards a path of evolving their practices to ensure clients' financial security and legacy preservation.

The journey through its pages begins by establishing a solid foundational understanding of risk management. It further delves into human-centric aspects, transitions into nuanced avenues of insurance tools, and explores the dynamic nature of estate planning. By providing a balanced blend of theory, real-world scenarios, and actionable strategies, this guide makes the learning practical, engaging, and immediately applicable.

## Key Highlights:

- Unveiling the critical role of financial therapy in addressing the emotional terrain of financial planning.
- Detailed exploration of life insurance and long-term care insurance as indispensable tools in a robust risk management portfolio.
- A deep dive into the dynamic nature of estate planning and its pivotal role in comprehensive risk management.

Whether a seasoned financial advisor or at the outset of a career, the insights shared in this guide hold undeniable relevance. Financial advising is no longer just about number crunching; it's about fostering a holistic understanding, adapting to global changes, and forming genuine, trust-bound relationships with clients.

This book is more than just a guide—it's a catalyst poised to propel practices into a realm of heightened expertise, adaptability, and trustworthiness. Embrace the evolution; your enhanced approach towards risk management is a monumental stride in your professional odyssey.



# THE SCHEDULE



## Training Syllabus

# JANUARY

### Monday 1/8

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Financial Therapy Unveiled:  
Chapter 1

### Friday 1/12

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Financial Therapy Unveiled:  
Chapter 1

### Monday 1/15

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Holiday: No Training

### Friday 1/19

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Financial Therapy Unveiled:  
Chapter 2

### Monday 1/22

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Financial Therapy Unveiled:  
Chapter 2

### Friday 1/26

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Financial Therapy Unveiled:  
Chapter 3

### Monday 1/29

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Financial Therapy Unveiled:  
Chapter 3

## Training Syllabus

# FEBRUARY

### Monday 1/29

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Financial Therapy Unveiled:  
Chapter 3

### Friday 2/2

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Financial Therapy Unveiled:  
Chapter 4

### Monday 2/5

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Financial Therapy Unveiled:  
Chapter 4

### Friday 2/9

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Financial Therapy Unveiled:  
Chapter 5

### Monday 2/12

---

Financial Therapy Unveiled:  
Chapter 5

### Friday 2/16

---

Financial Therapy Unveiled:  
Chapter 6

### Monday 2/19

---

Holiday: No Training

### Friday 2/23

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Financial Therapy Unveiled:  
Chapter 6

### Monday 2/26

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Financial Therapy Unveiled:  
Chapter 7

### Friday 3/1

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Financial Therapy Unveiled:  
Chapter 7



## Training Syllabus

# MARCH

**Monday 2/26**

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Financial Therapy Unveiled:  
Chapter 7

**Friday 3/1**

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Financial Therapy Unveiled:  
Chapter 7

**Monday 3/4**

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Financial Therapy Unveiled:  
Chapter 8

**Friday 3/8**

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Financial Therapy Unveiled:  
Chapter 8

**Monday 3/11**

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Financial Therapy Unveiled:  
Chapter 9

**Friday 3/15**

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Financial Therapy Unveiled:  
Feedback/Evaluation

**Monday 3/18**

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Mastering Communication:  
Chapter 1

**Friday 3/22**

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Mastering Communication:  
Chapter 1

**Monday 3/25**

---

Mastering Communication:  
Chapter 2

**Friday 3/29**

---

Holiday: No Training

## Training Syllabus

# APRIL

**Monday 4/1**

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Holiday: No Training

**Friday 4/5**

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Mastering Communication:  
Chapter 2

**Monday 4/8**

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Mastering Communication:  
Chapter 4

**Friday 4/12**

---

Mastering Communication:  
Chapter 4

**Monday 4/15**

---

Mastering Communication:  
Chapter 5

**Friday 4/19**

---

Mastering Communication:  
Chapter 5

**Monday 4/22**

---

Mastering Communication:  
Chapter 4

**Friday 4/26**

---

Mastering Communication:  
Chapter 4

**Monday 4/29**

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Mastering Communication:  
Chapter 5

**Friday 5/3**

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Mastering Communication:  
Chapter 5



## Training Syllabus

# MAY

### Monday 4/29

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Mastering Communication:  
Chapter 5

### Friday 5/3

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Mastering Communication:  
Chapter 5

### Monday 5/6

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Mastering Communication:  
Chapter 6

### Friday 5/10

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Mastering Communication:  
Chapter 6

### Monday 5/13

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Mastering Communication:  
Chapter 7

### Friday 5/17

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Mastering Communication:  
Chapter 7

### Monday 5/20

---

Mastering Communication:  
Chapter 8

### Friday 5/24

---

Holiday: No Training

### Monday 5/27

---

Holiday: No Training

### Friday 5/31

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Mastering Communication:  
Chapter 8

## Training Syllabus

# JUNE

### Monday 6/3

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Mastering Communication:  
Feedback/Evaluation

### Friday 6/7

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Ask Me Anything

### Monday 6/10

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The Blueprint: Chapter 1

### Friday 6/14

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The Blueprint: Chapter 1

### Monday 6/17

---

The Blueprint: Chapter 2

### Friday 6/21

---

The Blueprint: Chapter 2

### Monday 6/24

---

The Blueprint: Chapter 3

### Friday 6/28

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The Blueprint: Chapter 3



## Training Syllabus

# JULY

### Monday 7/1

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The Blueprint: Chapter 4

### Friday 7/5

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The Blueprint: Chapter 4

### Monday 7/8

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Leaders Conference: No  
Training

### Friday 7/12

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Leaders Conference: No  
Training

### Monday 7/15

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The Blueprint: Chapter 5

### Friday 7/19

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The Blueprint: Chapter 5

### Monday 7/22

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The Blueprint: Chapter 6

### Friday 7/26

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The Blueprint: Chapter 6

### Monday 7/29

---

The Blueprint: Chapter 7

### Friday 8/2

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The Blueprint: Chapter 7

## Training Syllabus

# AUGUST

### Monday 7/29

---

The Blueprint: Chapter 7

### Friday 8/2

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The Blueprint: Chapter 7

### Monday 8/5

---

The Blueprint:  
Feedback/Evaluation

### Friday 8/9

---

Ask Me Anything

### Monday 8/12

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 1

### Friday 8/16

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 1

### Monday 8/19

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 2

### Friday 8/23

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 2

### Monday 8/26

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 3

### Friday 8/30

---

Holiday: No Training

## Training Syllabus

# SEPTEMBER

**Monday 9/2**

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Holiday: No Training

**Monday 9/9**

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Mastering the Art of  
Retirement Income Planning:  
Chapter 4

**Monday 9/16**

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 5

**Monday 9/23**

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 6

**Monday 9/30**

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 7

**Friday 9/6**

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 3

**Friday 9/13**

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 4

**Friday 9/20**

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 5

**Friday 9/27**

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 6

**Friday 10/4**

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 7



## Training Syllabus

# OCTOBER

### Monday 9/30

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 7

### Monday 10/7

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 8

### Monday 10/14

---

Holiday: No Training

### Monday 10/21

---

Mastering the Art of  
Retirement Income Planning:  
Feedback/Evaluation

### Monday 10/28

---

Risk Management in Financial  
Planning: Chapter 1

### Friday 10/4

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 7

### Friday 10/11

---

Mastering the Art of  
Retirement Income Planning:  
Chapter 8

### Friday 10/18

---

No Training

### Friday 10/25

---

Ask Me Anything

### Friday 11/1

---

Risk Management in Financial  
Planning: Chapter 1

## Training Syllabus

# NOVEMBER

### Monday 10/28

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Risk Management in Financial  
Planning: Chapter 1

### Friday 11/1

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Risk Management in Financial  
Planning: Chapter 1

### Monday 11/4

---

Risk Management in Financial  
Planning: Chapter 2

### Friday 11/8

---

Risk Management in Financial  
Planning: Chapter 2

### Monday 11/11

---

Holiday: No Training

### Friday 11/15

---

Risk Management in Financial  
Planning: Chapter 3

### Monday 11/18

---

Risk Management in Financial  
Planning: Chapter 3

### Friday 11/22

---

Risk Management in Financial  
Planning: Chapter 4

### Monday 11/25

---

Risk Management in Financial  
Planning: Chapter 4

### Friday 11/29

---

Holiday: No Training

## Training Syllabus

# DECEMBER

### Monday 12/2

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Risk Management in Financial  
Planning: Chapter 5

### Friday 12/6

---

Risk Management in Financial  
Planning: Chapter 5

### Monday 12/9

---

Risk Management in Financial  
Planning: Chapter 6

### Friday 12/13

---

Risk Management in Financial  
Planning: Chapter 6

### Monday 12/16

---

Risk Management in Financial  
Planning: Feedback/Evaluation

### Friday 12/20

---

Year End Reflection

### Monday 12/23

---

Holiday: No Training

### Friday 12/27

---

Holiday: No Training

### Monday 12/30

---

Holiday: No Training

### Friday 1/3

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Holiday: No Training