



Syllabus for Continuing Education Program

Program Providers: National Association of Insurance and Financial Advisors Minnesota and Society of Financial Service Professionals Twin Cities

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Program Chair: Drew DeWitt, LACP

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Title: The Scheduling Solution

Presenter: Gina Pellegrini

Date: Thursday, May 6, 2021

Time: 11:45 AM Welcome and announcements

12:00 PM – 1:00 PM Presentation

1:00 PM The Zoom window will remain open 30-minutes for attendee and sponsor networking and connections

Location: Virtual Presentation: Zoom

Pre-registration required. Virtual meeting link will be provided in the registration confirmation email. Attendee login monitored for CE. Poll questions during the presentations must be answered to receive CE credits.

Attendance Fees: FSP & NAIFA Members: \$15

Nonmembers: \$30

Sponsors: Per benefit package

Refunds: No refunds for cancellations received after 4/30/2021 or for no show attendees.

CE Credits: This educational offering is APPROVED by the Minnesota Commissioner of Commerce as satisfying 1.0-hour of Standard classroom credit toward continuing insurance education requirements for each hour attended.

Who Should Attend: Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs

Level of Educational Complexity: Overview

Course Description

For over 40 years, Gina Pellegrini, the scheduling guru, has created and continues to build upon the key elements of scheduling effectiveness. In this session, Gina will share crucial strategies to overcome the pitfalls of scheduling.

When an advisor starts their business, they need to do everything; scheduling, appointment preparation, paperwork, client service, and answering the phone. At some point, their appointments begin to ebb and flow because they don't have enough time to get it all done. When the calendar is not full, week after week, the business does not grow. It's a proven fact, the calendar is the most important tool for every financial office. Whether an advisor wants 5 or 25 appointments per week, calls need to be made daily. Is this how an advisor should spend their time? Absolutely not!

The advisor needs someone to support them, protect their time, filter all interruptions, and most importantly schedule their appointments. If someone makes scheduling their top priority, the advisor could double their business revenue in one year.

With a repeatable process, you will have the number and type of appointments you want and turn prospects into clients and clients into referrers!

Learning Objectives

- Participants will learn scheduling techniques to keep calendars full
- Participants will learn delegation techniques
- Participants will learn crucial strategies to overcome scheduling pitfalls

Outline

- The impact of a consistent schedule of appointments
 - No more procrastination
 - Clients do not fall through the cracks
 - Consistent reviews
- The fear of delegating the scheduling and the solution
 - Clients are accustomed to hearing from me
 - No one can get the results I can
 - Calls won't be made
- The scheduling process
 - Developing a routine
 - Creating accountability
 - Confirming appointments
 - Prioritizing calls
- Effective language and strategies to stay consistent
 - Words of compassion and empathy
 - Open ended questions
 - Accountability to self and to client

Instructional Materials for Registered Attendees: Handouts if any will be included in the confirmation email to registered attendees.

Examination & Answers No exam