



T.RowePrice

The Next Wave of Advice: Differentiating with Coaching

Clients want more than just a financial advisor who creates a plan. They want a coach who can help them successfully implement it. Learn how to stand out from the competition—both human and AI—by delivering your expertise in a way that many young and wealthy investors prefer.¹

This program provides:



Principles and practices of exceptional coaching.



A repeatable, step-by-step process designed to improve client satisfaction.



Best practices for delivering advice that your clients are more likely to follow.

Why embrace a coaching mentality?

56% of the highest earners under age 50 want a financial coach. Connect even better with these clients.¹

68% expected increase in robo/AI platforms by 2027. Stay relevant in the face of competitive technology.²

50% of clients implement less than 20% of the advice they receive. Almost 20% don't implement any of their financial plan.³

Materials for financial professionals



Understand why coaching matters

- Learn how the changing nature of the advice industry demands a new approach.
- Discover how you can easily incorporate coaching into your practice.



Follow specific steps to get started with coaching

- This guide is designed to help you identify coaching prospects, strengthen your relationship with them, and improve the transition from financial planning to implementation.



Make the most of the information clients share

- After clients complete the Financial Behavior Assessment included, you can utilize our three-step process to create and maintain a more successful partnership.



Dive deep on curiosity, courage, and compassion

- This article explains why these bedrocks of coaching are so important—and how you can build them into your practice to differentiate yourself from competitors.

¹ T. Rowe Price Next Wave of Wealth Research Study, January 2020. Highest earners here is defined as the top 10% of earners under age 50.

² CFA Institute, "Future State of the Investment Industry," 2023.

³ Wealth Professional, "When formal financial plans are a poor fit," <https://www.wealthprofessional.ca/news/industry-news/when-formal-financial-plans-are-a-poor-fit/323484>.

Materials for investors



Guide clients to discover more about their relationship with money

- Help clients better understand their relationship with money, and pursue their financial goals with greater clarity.



Host a coaching workshop

- Use this turnkey, 30-minute presentation—complete with speaker notes—to guide clients and prospects through their coaching journey with you.

TO LEARN MORE

Contact your regional sales consultant by calling **800-564-6958** or emailing us at **AdvisorServices@troweprice.com**.

INVEST WITH CONFIDENCE.®

You can find additional resources at **troweprice.com/practicemanagement**.

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