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Professional Life Coach

541 | 383 | 3228

## **Specialty Programs**

### **Wealth in Motion:**

As retiring Financial Advisors transition their clients over to younger team members in a 3-5 year process, many challenges surface. This program assists with:

1. Transition Management
2. Running Interference
3. Team Development and Management
4. Seamlessly Integrating clients into the new system
5. Clarifying, Motivating, Focusing and Fostering Momentum