

SOUL

What David J Scarlett Will Bring To Your Event

Thank you for taking time to learn about how I can contribute to your event.

Below – and in the various videos on our website – you’ll find material which will give you a sense of speaking style and content.

Completely Different

In the 15 years that he has been professionally speaking, coaching and writing, David has delivered powerful, transformative messages to thousands of professionals all over the world.

A gifted communicator, as well as an accomplished business coach... from the moment that David starts to engage an audience, his purpose defines his style.

- He’s not there to inform them... although there will be information aplenty, supported by robust research and empirical evidence;
- Nor is he there to inspire them... although delegates at conferences, seminars and workshops enthuse in writing about his inspirational impact;
- What happens when David speaks and facilitates is transformational. His message transforms perspective... thinking... behaviour

And delegates love it!

Who Does David and His Team Love to Talk To?

- Founders, leaders and senior decision-makers in financial advisory and financial planning firms;
- Leaders who are not ready to ‘ride off into the sunset’. They’re ready to elevate their business and improve the quality of their life, their team’s life, their clients’ lives;
- Leaders who are already good at what they do. So, they don’t need to be taught the basics of creating revenue;
- Leaders who feel that they’d like their team to make a greater difference in their clients’ lives. They’re just not sure how to do that!

Real Solutions to Real Problems

Given his profession, his five adult children and his demanding ministry... there are few of life's real, testing, painful problems that David hasn't met – and helped leaders to overcome:

- Leaders who are stretched thin by a business which is consuming them;
- Teams that don't seem to be on the same mission, or heading in the same direction, as the leader (or each other);
- Exhausted Adviser and Support teams, frustrated with the grind of limited incremental growth, year after year;
- The absence of a coherent referral strategy. So, the business is weighed down by far too many clients who are not Absolutely Ideal;
- A revenue imbalance, where the highest fees are still created by the founder or leader;
- A lifestyle business model that is not sustainable or scalable, without the founder and/or leader continuing to work their socks off... forever.

Delegates will soon see that David's work has included solving all of these meaty problems.

Presentation Overviews

Typically, David engages delegates through 2- to 3-hour workshops.

However, the content has also been designed to deliver more succinctly via 1-hour seminars and 15- to 30-minute conference key-note presentations.

Title	Description
<p>The Financial Planning Revolution</p> <p>(The 4-Stage Journey That Transforms Businesses and Explodes Industry Myths)</p>	<p>We believe that much of this profession’s traditions are strangling its future... and holding your success hostage.</p> <p>David’s work with Financial Advisers and Planners shows that you can create a life-enhancing business, by blasting through those traditions and myths.</p> <p>This workshop helps Advisers/Planners to think radically differently about their role. Then demonstrates what happens to revenue, team performance, fulfilment and enjoyment... when that revolutionary thinking is put into action</p>
<p>The Transformational First Meeting</p> <p>(Forget About Slick Presentations! This Is Where Client Trust, Engagement and Seriously High Fees Start.)</p>	<p>In spite of all the industry talk about being Client Centric... hundreds of searching interviews with Financial Advisers/Planners shows that early client meetings are anything but!</p> <p>In this workshop you’ll learn to stop presenting... stop persuading... stop talking... and to ‘shut up’ in a most intriguing way.</p> <p>You’ll also learn why much that is taught about questioning and listening in Financial Services has become part of the problem – not the solution. Finally, you’ll see that there’s a way of engaging with clients, which creates Trust-at-Speed™; and why this naturally leads to much higher fees.</p>

Title	Description
<p>The Prosperous Adviser</p> <p>(How To Increase Influence, Impact and Income... And Engage In Work which Truly Inspires You)</p>	<p>There are few business experiences so satisfying as when a client becomes deeply, enthusiastically engaged in their relationship with you and your team.</p> <p>What magnifies that satisfaction is when their engagement with you changes their life, not just re-organises their money.</p> <p>Why this makes your firm more exciting to be part of...</p> <p>Why clients will willingly pay you much higher fees... And why they then become your most enthusiastic advocates ...</p> <p>This you'll discover during this workshop.</p>
<p>Get A Life!</p> <p>(7 Ways to Banish Business Stress, Escalate Revenue and Create Far, Far More Free Time)</p>	<p>Time Management Doesn't Work!</p> <p>It doesn't work, because you can't manage or control time.</p> <p>What Financial Advisers & Planners (particularly leaders) can do is to radically alter their behaviour in their professional role.</p> <p>There's now plenty of evidence to show that you can transform the quality of your life in this profession. You really can stop business pressure becoming overwhelming and stressful.</p> <p>This workshop will show you how – by doing that – you can create a highly successful 'Lower-Activity, Higher-Performance, Richer Results' firm.</p>

A Voice of Integrity

With 20 years' experience as a Financial Adviser and Planner ...

With experience of implementing fee based Financial Planning - including cashflow forecasting - as far back as 1991...

Having led two financial advisory firms...

Having used coaching methodology with financial planning business-owner clients since 1997...

Having professionally coached hundreds of leaders in the financial services sector ...

David speaks from a place of Integrity.

Going Deeper, Soaring Higher

David's brand 'The Soul Millionaire' points to his ability to get deep to the heart and soul of What Really, Really Matters... in business and in life.

It is this capacity – demonstrated in his books, in his seminars, in his workshops – that sets David apart

He can take your delegates' aspirations so much higher... because he quickly, succinctly and easily gets them to see and think so much deeper

And 'Higher' means

- higher client engagement
- higher fees, revenue and income
- higher leadership effectiveness
- higher team performance
- higher fulfilment
- higher levels of freedom and enjoyment

As one Managing Director said, "David has an extraordinary gift to move audiences!"

if there's one phrase that captures the impact that David's work has on financial services leaders and their businesses... that phrase would be "Dare To SOAR".

Life Changing

- If you want your audience to be more than entertained...
- If you want them to feel that they've experienced something life-changing...
- If you want them to remember why they felt that... years later
- If you want them to leave with the capacity to start changing what they do...

Then David, and The Soul Millionaire Journey, could be an important part of your next event.

If You'd Like to Talk Through Whether What We Teach and Speak About Is Relevant to Your Delegates or Team...

You Can Reach David Here:

Email: david@soulmillionaire.com

Direct Line: 01342 327 414

Praise for David J Scarlett as a Speaker

“Thank you for coming to Scotland, to conduct our Financial Planning Seminar. From our position as hosts, the day was a great success, and the feedback I received was that everyone took something from the day.”

Simon Glazier, (now Managing Director, Stewardship Wealth)

“Thank you for a fantastic and inspirational session. Financial Planning leaders, as well as graduates in the audience, were able to relate to your ideas. For myself, I could listen to you all day!”

Dr Lien Luu, Associate Professor of Finance, University of Coventry

“Just a note to thank you for an excellent and extremely informative event for our Financial Planning members.”

Colin Anderson, Client Relationship Manager, CISI

“We had really good feedback on yesterday’s Northern Home Counties meeting, and you certainly made a few people think hard!”

Nicola Watts, CFP™, Director Jane Smith Financial Planning

“Within a couple of minutes of you starting your PFS conference presentation... I felt you were talking just to me! Since then, you have made a great impact on me, my family, our firm.”

Mark A Smith, Partner, Simpsons Wealth Management

“I did so enjoy the presentation; and can see the value in many of the approaches you highlighted; particularly when considering deeper client engagement.”

Kirsty Wood, Director, Watson Wood Financial Planning

“I would like to tell you that I thoroughly enjoyed the seminar in Chelmsford, and found it extremely interesting and insightful”

Lauren Peters, Chartered Financial Planner, Helm Godfrey

“I just wanted to thank you for your presentation yesterday afternoon at the CISI event. I found the content fascinating and you’ve given me a lot to think about - as well as some new books to add to my list!

Colin Anderson, Investment Manager, Rathbone Brothers Plc

“David, I thought you were excellent. Well done. I thought the workplace video was profound.”

Les Philips, Director, Index Wealth Management