IMPROVING MARGINS WITH CAREER-RELATED PRODUCTS FOR THE RETIREMENT INCOME INDUSTRY.

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www.stybelpeabody.com

www.boardoptions.com

OBJECTIVE: a conversation

- Providing value to clients.
- Creating client retention products.
- Specific products/approaches.

STYBEL
PEABODY &
ASSOCIATES, INC.

Is This Important?

- A penny earned is a penny of savings that remains invested.
- A penny consumed through W-2/1099 has more value than a penny consumed from investments.

STYBEL PEABODY & ASSOCIATES, INC.

- BOTTOM LINE?

STYBEL PEABODY & ASSOCIATES, INC.

WITH YOUR CLIENTS

- Survival, Success, Significance Continuum.
- Start with Death and Work Backwards Into Full Time, Portfolio, and Retirement.

STYBEL PEABODY & ASSOCIATES, INC.

PRODUCT #1
Online Career Interest Inventories

- For Your Clients.
- For Your Clients' Children and Grandchildren.

STYBEL
PEABODY &
ASSOCIATES, INC.

Career Interest Inventories

- Versus Personality Tests.
- Strong, Campbell, SIGGY, Kuder.
- Use a licensed psychologist who understands the world of work.
- Contact your State Psychological Association. Go to:http://www.apa.org/practice/refer.html

PRODUCT 2: ROLE MODELS FOR PORTFOLIO CAREERS

- Go to aocfi.org for companies that can provide coaching/role models.
- Consider career coaches as part of the professional team along with CPAs, estate planning attorneys, and tax attorneys.

STYBEL PEABODY & ASSOCIATES, INC.

YOU’VE GOTTA HAVE A DREAM; IF YOU DON’T HAVE A DREAM, HOW YOU GONNA MAKE A DREAM COME TRUE?

THANK YOU!

STYBEL PEABODY & ASSOCIATES, INC.