

Speaker Profile: Jennifer Goldman, CFP®



Jennifer Goldman
CONSULTING

Biography:

Jennifer Goldman, Certified Financial Planner, is a business transformation consultant. She is driven by the mission to help independent services businesses bring their expertise and services to as many consumers as possible. Through all experiences, Jennifer realized businesses needed clarity on solutions and adoption assistance to create scalable, profitable businesses with excellent client and staff experiences.

Presentation:

Transforming Your Business to Thrive

In this energetic workshop-style presentation, Jennifer provides business examples and demonstrates how to transform your business to grow, empower staff, increase capacity, reduce labor costs, increase client communications and satisfaction, and lower owner burnout.

Attendees actively participate in two interactive exercises:

- Advisors complete the JGC's Role Responsibility chart® to identify capacity, skill and passion gaps as well as potential owner burnout indicators. We collaboratively identify potential solutions that range from elimination of work due to integrations/automation, intern training program, job description project with staff to the use of outsourced service providers, careers website page, and recalibration of staff into better-suited roles that empower the staff and allow them to "rise".
- Advisors enter a "clunky" process into the JGC Process Template® that helps identify specific missed opportunities to lower the workload. Advisors are given Post-It boards to draft and we work collaboratively to identify opportunities to lower the workload. Processes will range from new client onboarding to lead-2-prospect to investment reporting and financial plan updates.

Format:

This presentation is a highly engaging and collaborative workshop-style approach that includes two interactive exercises. Take-aways include clarity on solutions to consider (hopefully within the exhibit hall*), a personalized plan of action and identification of staff skill, passion, and capacity gaps. *Click on video clips below.*



Preferred Audience:

C-Level Executives of professional services businesses with 2+ advisors, an operations manager, 2+ support staff and a willingness to improve the business in multiple areas (marketing, sales, tech, process, staff, compensation, etc.) while maintaining a growth rate of 10% or more a year.

Logistics:

Reimbursement for airfare to/from Boston MA, rental car or Uber, hotel, and speaking fee (starts at \$1,000) that is dependent on time out of office, access to attendees list, and length of session.

References of Past Presentations:

MDRT Guy Baker
FPA National
FPA NorCal William Pitney
Tech Tools Joel Bruckenstein

CSSI/The Exchange Chris Cruz
FPA Philly Paula Nangle
FPA Boston Dan Galli
Insiders Forum Bob Veres

Click on video clips below.



Published:

Technology Tools for Today's High Margin Practice
InvestmentNews
Inside Information
Inc. Magazine
IRIS

The Trust Advisor
Technology Tools for Today
NAPFA
Journal of Financial Planning
The Liberated CEO

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