

Elixir Consulting Speaking Services

We have a team of consultants who are trained, experienced and excellent at delivering keynote addresses, training sessions and workshops. You may choose from our library of presentations or request a specific topic for your event.

Our practice is to always research our delegates and customise each presentation to ensure that it is relevant to each specific audience.



Library of Presentations - our current Top 5.

Contact us for more information on these and other topics.

1. Pricing Advice

We have a range of presentations on this topic, designed for all audiences from those who still need convincing that losing commissions is not the end of the world, through to those who have been charging fees for some time and are seeking an advanced level of discussion on the challenges they face.

Sessions include:

- Research Findings from advisers who have successfully transitioned their businesses to Fees
- How to create the right pricing model for your financial planning business
- Four Fee Models that work
- Asset-Based vs Flat Fees – which model is right for your business and clients?
- Selling Your Fees

2. Selling Advice as a Trusted Financial Adviser

A range of presentations, workshops and training days on sales skills for financial planners, based on the philosophies outlined in our paper, “Building your Business on Trust”:

The skills required to effectively communicate with clients, develop strong and long relationships, and ‘sell’ advice are unique to the financial planning profession. Our range of training workshops are specifically designed to hone the interview techniques of financial advisers, and provide personalised coaching through a combination of group-based discussion and individual role plays. Modules are designed to include all aspects of the advice process, from the initial engagement of a client, through to conducting review meetings; and are available for new advisers, as well as those with years of experience who are wanting to update and improve their skills.

3. Challenging Best Practice

This interactive presentation pulls apart some of the widely-espoused concepts about ‘best practice’ methods of how to run a financial planning business, and allows the audience to discover some myths, and challenge some long-held beliefs. Participants always take away a new perspective that they can apply to their business.

4. Top Ten Brilliant ideas for Financial Planning Practices

Our consulting team has worked with thousands of financial planners around the country and offshore, and have collaborated to bring you our favourite ten bright ideas that we have seen in practice, that result in greater profitability and/or client satisfaction.

5. Delivering effective client reviews

40,000+ clients who have completed the Business Health Catscan client satisfaction survey continually rate review service delivered by their advisers as by far the worst performing area. This presentation looks at how advisers can ensure that their client reviews are meaningful and valuable to their clients.

Our speaking terms.

Quality Guarantee:

Elixir Consulting prides itself on providing quality speakers and quality material. Should any presentation not deliver what was promised and the client does not feel that its value matches their investment, we provide a full and immediate refund, less travel costs. Whilst we have never been asked to act upon this guarantee, we continue to provide it as a reassurance of our commitment to quality and professionalism.

Payment Terms:

50% deposit is required upon execution of the booking agreement to guarantee the booking. The balance of the speaking fee will be payable 14 days prior to the engagement upon receipt of a Tax Invoice from Elixir Consulting.

Cancellation:

Cancellation within 30 days of the presentation date will result in forfeiture of the deposit. Cancellation within 14 days of the presentation date may result in 100% cancellation fee. In the unlikely event that the speaker booked suffers a catastrophe and cannot conduct their presentation, a suitable replacement will be arranged by Elixir Consulting. If this is not possible, the fee will be refunded in full. You should take comfort in knowing that Elixir Consulting has never had to substitute a speaker, nor have we ever cancelled or failed to appear for an engagement.

Testimonials

"Engaging Sue Viskovic as our expert speaker has been greatly appreciated by our clients. The advisers felt that her style of presentation, expertise and passion to assist advisers in transitioning their fee models is unrivalled in our industry."

Kristine Wade, National Sales Manager, Zurich Investments.

"In 15 years in the industry I have not seen a response from a round of PD days as I have seen with these. Sue can clearly articulate her research and offers practical hands-on solutions. Sue has experience across the industry from product manufacturing and distribution through to general management of a financial planning business as well as being an adviser herself. She understands the core of business sustainability and profitability which many of these types of firms do not. I would recommend any financial services business from manufacturers of financial instruments through to dealer groups to get in touch with Sue for an immediate meeting. How refreshing!!!"

Chris Dalton, National Sales Manager, Next Financial Limited.

"Brilliant. Give me more. She 'gets' it! Magnificent presenter."

Delegate, Genesys PD Days, November 2009.

"Great ideas and explanations on difficult issues. Very professional and on the ball".

Delegate, Premium Wealth Management Conference, November 2009.

"Very topical and relevant. Some good ideas to take back to the firm. The presenter was great; interesting, well informed and spoke really well."

Delegate, 2009 FPA National Conference.

