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DRIVE YOUR BUSINESS FORWARD



A mid-year review checklist helps you connect with clients

A mid-year review can create an opportunity to connect with clients, re-assess their priorities and make necessary adjustments. This “Quick 6” checklist can help guide the conversations.

[Get the checklist](#)

Ideas to help you grow your business

For You



How to help put your clients at ease — and why it matters

Helping clients feel comfortable can be nearly as important as the financial guidance you provide. Discover 3 ways to help put your clients at ease.

[Find out](#)

Indexed annuities and mutual funds: What's the difference?

Compare these solutions and the ways they can work together in a retirement strategy to help address different challenges.

[Discover more](#)

For Your Clients



Revisiting your retirement plans

Is your client's retirement plan still working for their goals? Share five reasons that can inspire a retirement checkup and how clients can help keep their portfolio aligned with their future.

[Explore reasons](#)

Sneaky expenses that can wreck your budget

Small expenses can quietly drain your client's wallet. Share what costs to look out for and budget-friendly ways to help them spend smarter and protect their financial goals.

[Learn more](#)



Helping Clients Through Life's Toughest Financial Conversations

Tuesday, July 28 | 11:00 a.m.

Many of the most difficult conversations financial professionals face concern tough issues like family dynamics and the increased stress and finances of caring for a loved one. Join Sonya Lutter, CFP® and LMFT, as she explores the evolving role of today's financial professional — and how you can serve as a trusted guide when clients need you most.

[Register now](#)



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