

Guiding Baby Boomers through Change

Training Program for Advisors, Coaches and Consultants

Baby Boomers represent a market of 78 million people in the US. According to KPMG, about 10,000 turn 65 each day. In 2015, the global number of people age 65 or older was 750 million, by 2020 it will be over one billion.

That is a large population going through a lot of change.



The
**Platinum
Years**

PEACE-OF-MIND TODAY. TOMORROW.

The Platinum Years® Programs

- **Private Coaching**

- Explore Coaching™
- What's Next? Coaching™
- Retirement Journey
- THINK, LIVE, DECIDE



The
**Platinum
Years**

PEACE-OF-MIND TODAY. TOMORROW.

- **Workshops**

- Explore Workshop™
- What's Next? Workshop for business Owners™
- Living with Purpose Workshop™
- My New Life Workshop™

- **Self-Reflection programs**

- Exploring Your Life, Shaping Your Future™
- What's Next? Self-Assessment™
- Guidebooks on Divorce, Retirement, Succession, and more

New Revenue

- New source of revenue from delivering the programs
- Provides door-openers for your other services
- Creates more “touch points” by being able to go deeper with clients
- Opens up intangible “Rain Making” opportunities

Marketing Advantages

- New offering gives you a competitive edge over others in your field
- Raises you to the position that of highly-trusted adviser status by providing personal support that other advisors are not
- Co-branded guides to use as lead generation tools on your website
- Co-branded books for “*7 Principles For Living With Authenticity*” and “*Finding Your New Owner*” with your marketing message, logo or photo
- Affiliate income from STPI’s online learning programs

Business Development

- Overview presentation of the “soft issues” that hold people back from making decisions
- PowerPoint presentation and flyers are provided for you to sell the programs
- Global exposure with listing in STPI’s online Advisor Network
- Receive ongoing business development support from STPI
- Opens up new referral sources by working with professionals involved in personal and business transitions

Training for Advisors, Coaches, Consultants

Transition Planning Consultant

- 5 Private Coaching Programs
- 3 Workshops
- 4 Online Assessments

Transition Advisor

- 4 Private Coaching Programs
- 2 Workshops
- 3 Online Assessments

Coach

- Guidebooks with Private Coaching
- 4 Online Assessments

How Training Works

1. Experiential learning
 - Experience a program as a client
2. Role-play: using program with “clients”
3. Marketing
4. Money-back Guarantee

Self-Reflection

Offer Two Programs of Self-Reflection plus Books

What's Next?
Self-Assessment™



Exploring Your Life,
Shaping Your Future™



Two Programs of Self-Reflection



1. Online 20 minute Questionnaire and Report
2. Book
3. Self-Discovery Guidebook

Only \$299

Self-Directed Guidebooks

- The Retirement Journey
- Creating My New Life after a Divorce
- Creating a New Life after the Death of a Loved One Handbook
- Successful Career Transition
- Mid-Life Handbook: Living with Meaning and Purpose
- Today's Empty-Nester

\$99 each

Handbooks Coaching Package

- Guidebooks*
 - The Retirement Journey
 - The Successful Business Transition
 - Creating My New Life after a Divorce
 - Creating a New Life after the Death of a Loved One
 - Successful Career Transition
 - Mid-Life Handbook: Living with Meaning and Purpose
 - Today's Empty-Nester
- * (choice of two handbooks, and two FYNO or 7 Principles books)
- Training to use materials
- Training to use Advisor Dashboard/Survey Center*
- Free Listing in Advisor Network on our website

* Requires optional subscription

ONLY \$700

Options for Coaches/Advisors

Program	Transition Planning Consultant	Transition Advisor	Coach
Private Coaching			
THINK	X		
LIVE	X		
DECIDE	X	X	
Explore Coaching	X		
What's Next Coaching	X	X	
Handbooks with Coaching	X	X	X
Workshops			
Explore	X	X	
What's Next?	X	X	
Living with Purpose	X		
Self-Reflection			
"Explore" or "What's Next?"	X	X	X
Handbooks	X	X	X
Hours of Training	40	10	3
Initial Cost	\$10,000	\$1,200	\$700
Survey Center Access Fee: \$1000/yr.	X	X	X
Money-Back Guarantee	©2015-2019 Successful Transition Planning Institute ThePlatinumYears.com Yes	Yes	Yes

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