Why Advisors Should Use COREnology

1. Enhanced Client Engagement

- Opportunity for advisors to engage with their clients on a deeper level

2. Improved Client Understanding

The assessment offers valuable insight into clients

- Values/Priorities/View on Wealth
- Allows advisors to tailor financial strategies to align with goals

3. Holistic Financial Planning

- Incorporating discussions about COREvalues™ and family priorities
- Advisors can provide a more competitive approach to financial planning

4. Family Legacy Planning

- The wealth values assessment helps clients identify shared family values and goals. Advisors can assist in creating a legacy plan that transcends generations

5. Effective Communication

- The tool aids in improving communication within families. Advisors can guide clients in enhancing their communication and reduce misunderstandings and conflicts

6. Competitive Advantage

- Showcases a commitment to innovation and client centric
- Offers solutions to aid in client retention
- Reliability to attract new clients

7. Client Retention and Loyalty

- The tool helps advisors keep track of client values and priorities to better demonstrate a commitment to client well-being beyond financial returns