Ed Howat, Jr.
CLU, ChFC, LUTCF, RCC

Ed Howat has been a sales trainer and coach for the past 14 years. His primary focus is coaching financial advisors and sales managers. Ed started his career with Northwestern Mutual as a Special Agent and then moved to sales management as a District Agent. Ed then joined Manulife Financial, holding positions as an Agency Manager, Wholesaler and Sales Training Director. He later moved to Nationwide Financial as Field Training Manager and worked with wholesalers and sales managers.

Ed believes that it is important for experienced, successful people to mentor the next generation of financial planners by passing on knowledge and skills.

Experienced people need to take on the role of "elder" and help people succeed. It is up to those who have enjoyed and prospered from their careers as financial professionals to pass on their wisdom, knowledge, experiences and insights.

Addie Woods Consulting Co.

2065 Kings Rd
Eagan, MN 55122

651.405.6644
ed@addiewoods.com
www.addiewoods.com

Addie Woods Consulting Co

Helping you do what you know...

651.405.6644

WHAT WE DO

Addie Woods Consulting Co helps you get more of the right things done and helps you close the gap between what you already know and what you do. Putting knowledge to work is one of the key elements for success.

Acquiring more knowledge may not be as important as implementing what you already know.

At Addie Woods we help you with your plan, but then we help you implement it and make it real. We add a level of accountability that keeps you focused and organized.

FOUNDATIONS OF MANAGEMENT

Addie Woods offers online learning programs for financial professionals that include facilitated meetings to teach, apply and reinforce knowledge and skills.

The program includes online learning modules, facilitated meetings, group coaching, one-on-one coaching, plus action plan follow-up sessions using the Success Quest Online Mapping Program.

COACHING

We offer coaching and training programs that allow you to work and learn at the same time.

Addie Woods helps you find the resources you need to leverage your time and meet the changing needs of your clients.

PRACTICE MANAGEMENT

You are working hard. Your challenge is to blend your business and your personal life. How do you work less and earn more? How does your practice compare to other financial professionals?

Are you getting a sufficient number of net new clients? Can your clients tell others what you do in a short, articulate way?

Are you doing enough to differentiate your business from the competition? Are you adequately staffed?

Do you have a business succession plan; do you have a financial advisor who will work with your family after you are gone?

The most important questions:

- Are you using all your knowledge?
- Are you leveraging your time?
- Are you leveraging your resources?
- Have you covered all the fundamentals with your clients?
- Are you cross-selling?
- What needs to change to improve net revenue and increase the value of your business?

Addie Woods can help you answer these questions and help you implement the solutions. Take the Business Practice Assessment and get an x-ray of your Business.

RELATIONSHIP MANAGEMENT

How well do you know your best clients and their families? If a client dies, will you be in the loop to work with the surviving family members? Or will another financial advisor benefit from all that you have done?

Are you making sure that your clients are doing the things they need to do to keep the promises that they made to their families? As the trusted advisor, you should be the "go-to" person in those trying times. Every family member should know who you are and look to you for advice.

Have you prepared your family to survive and prosper when you are no longer around? Are you keeping the promises you made to your family?

Addie Woods Can help you rethink your mission, vision and client services. It all starts with thinking about thinking.

It starts with learning about how you make decisions. it is not about what you value, it is about learning how you value.

MindScan is a tool that you can use to learn about how you think. Take the Free MindScan Value Profile.

Addie Woods Consulting Co.

2065 Kings Rd
Eagan, MN 55122

651.405.6644
ed@addiewoods.com
www.addiewoods.com