LIMRA Learn China Pathways

Video Descriptions

Selling to Contemporary High Net Worth Prospects

如何向当代高净值客户销售

Identifying with Your Purpose 认同你的目标 **(17:02) - Manny Amezcua** 曼努埃尔·阿梅兹库阿

Undoubtedly, the most challenging aspect of being a financial professional is getting in front of people. There's a constant stream of rejection, and it can be challenging to come to work every day. According to field leader Manny Amezcua, creating and sharing a Purpose Statement is the best way to ensure focus and determination. An additional factor in adhering to your Purpose Statement is daily reflection. What went well? What didn't? What can you do to improve? Did your actions reflect your purpose? By soliciting and accepting feedback, Amezcua was able to change his approach so it more closely aligned with his purpose. In order to evaluate your success, you must also look at the numbers - how many appointments you booked versus how many you kept. Combining the numbers with the less tangible sense of purpose creates actionable results that will allow you and your business to grow.

对金融产品销售专业人员来说，最困难的事情毫无疑问就是去面对客户。不断地被拒绝，这对每天的工作都会是很大的挑战。曼尼·阿梅兹库阿做过销售主管，他为自己制定了目标声明（Purpose Statement）并将其不断与他人分享，他认为这是让他能够保持专注和决心的好办法。另一个元素就是要每天对着目标声明做反思，哪些进行得顺利？哪些遇到了问题？如何改进？你的行动与你的目标一致吗？不断的询问意见并改进，阿梅兹库阿才能不断改变自己的行为模式，使其更符合自己的目标声明。为了评估你成功与否，你必须检查并记录你的活动量，比如，你安排了多少约见，你又实现了多少? 将这些数字与无形的目标感结合起来，就可以创造出切实可行的结果，从而让你和你的业务得以发展。

Using the Power of Why in Your Approach 善用 **“为什么”的力量(14:15) - Randy Taylor** 兰迪·泰勒

In this interview, industry expert Randy Taylor of Taylormade Leadership discusses how to differentiate yourself and approach prospects in a new way by connecting to your "Why". Randy shares a process to enable you to connect with your purpose and craft language so you can articulate that message in the marketplace. Randy will help you identify with your emotional connection to the business, attach a story to your "Why", and script out language that you can internalize to differentiate yourself and connect with prospects and clients.

在本次访谈中，我们邀请的行业专家--泰勒领导学院的兰迪·泰勒会与大家分享：如何通过“为什么”（描述你的初心）让自己脱颖而出，并以一种新的方式接近潜在客户。兰迪分享了一个流程，这个流程可以让你始终专注于你的目标，并能够通过精心组织过的语言在市场销售中清晰表达自己的意图。兰迪将帮助你确定你与你的事业有怎样的情感联系，然后在你的“为什么”中加入一个故事，编写成你可以内化的、只属于你自己的话术，并籍此与潜在客户和现有客户建立联系。

Mindset of Today’s Consumer: Bridging the Procrastination & Trust Gap 当今消费者的心态：弥合拖延与信任的鸿沟 (8:05) - Joey Davenport 乔伊 ·达文波特

Joey Davenport, president of Hoopis Performance Network, talks about the need for life insurance, and why consumers procrastinate purchasing it. He says that 43% of consumers are afraid of making a mistake in their financial decision planning. Joey talks about the mistrust in the marketplace and how as an advisor there is an opportunity to debunk this. He gives examples of what one can do in the marketplace to bridge this trust gap.

Hoopis Performance Network公司的总裁乔伊·达文波特讲述了消费者对人寿保险需求的认可，以及人们拖延购买行为的原因。他指出，有43%的消费者害怕在财务决策中犯错。乔伊还谈及了市场上对金融专业人员的不信任，以及作为一名顾问如何改变这一现状。他举例说明了作为寿险代理人，应该做些什么来弥合这种信任差距。

The Link Between Mental Wellness and Financial Wellness 心理健康与财务健康之间的联系 (8:41) - Jane Blaufus 简・布劳福斯

Mental Illness and personal finances tend to be taboo topics that no one likes to acknowledge or talk about. Author and Speaker Jane Blaufus says that mental and financial well being go hand in hand. She provides the three key stressors in a persons life which is: personal and household finances, budgeting and unexpected expenses. Jane gives best practices for financial advisors to help their clients avoid a lot of stress and anxiety by meeting with soon to be married clients to talk about these issues and put a game plan together so there are no surprises later on. She also provides advice to advisors who have group insurance client some of the value add tactics that they can bring to the table as well.

心理疾病和个人财务状况往往是人们不愿公开谈论的禁忌话题。作家兼演讲者简·布劳福斯表示，心理健康和财务健康是息息相关的。她提出了个人生活中的三个主要压力源：个人和家庭财务、预算和意外开支。简在她的演讲中为财务顾问提供了一些最佳实践案例，描述了如何帮助客户减轻压力和焦虑，例如，与即将结婚的客户会面，讨论财务问题，并制定规则和计划，以避免日后的意外状况；她还向拥有团体保险客户的顾问提供建议，让他们认识到为客户提供增值服务的意义。

Interweaving Virtual Networking with Traditional Networking 将网络社交与传统社交相互交织 (5:11) - David Fisher 戴维・费舍

Interested in creating more relationships, developing trust between you and the people in your network, or finding more business opportunities? David Fisher of Rock Star Consulting shares insights on how incorporating online networking with traditional methods can work to do all of these things with a low investment of time and energy. Learn how interweaving both methods of networking can be a powerful way to get connected with the right person, at the right time, with the right information.

你是否有兴趣建立更多的人脉关系，在你和朋友圈中建立信任，或者寻找更多的业务机会？Rock Star咨询公司的大卫·费舍为大家分享了他的经验，告诉大家如何将网络社交与传统社交相结合，通过很低的时间和精力投入，达成上述的所有目标。他将让你了解，如何将这两种社交方式交融在一起，成为一种更有力的方式，帮助你在正确的时间、通过正确的信息与正确的人建立联系。