

Selling financial solutions

Present numbers convincingly



Why this is a must

Visualise any money matter with just a pen, paper and calculator, and lead your client to the solution to their problem.

You know your worth, so impress others with your poised and confident manner.

Who benefits

All sales personnel and advisors in the financial services sector who want to be more self-confident when dealing with clients – by providing outstanding solutions to (mathematical) financial issues and by reinforcing the client relationship and facilitating closing.



Training course contents

- Key interconnections in commercial and financial mathematics – understand 100% and apply confidently in consulting
- Visualisation of all of your clients' money matters – with just a pen and a sheet of paper, spontaneously and professionally
- Calculation of complex financial issues with a simple financial calculator – fast, correct, and together with the client
- Lead clients to the right decision by means of an active financial dialogue – dynamic, respectful and convincing
- All of this is achieved by exclusively working on practical case studies – from retirement provisions to zero-bonds

Training methods

- An initial check determines the existing level of knowledge without any loss of face
- Easy-to-remember rules for spoken signals and calculations are practised with partners and then applied to case studies
- Synchronous learning: a special video set up that allows all participants to see what is visualised and calculated in a one-on-one discussion
- A clear didactic structure that develops skills step by step and anchors newly acquired knowledge
- Consistent documentation of all calculated examples in the participants' manual ensures a lasting learning transfer

For individuals

Would you like to participate in a public training? Please contact us:

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For Teams

In-house seminars are the best value for groups of 5 or more.



a confidential environment



tailor-made solutions



learning partnerships



teambuilding effects



your ideal date & location



real individualisation