



Talking Values

with Elise Little,
Customer Success Executive at Lumiant



<p>Support & protect those I love</p>  <p>FINANCIAL</p>	<p>Feel confident in my finances</p>  <p>FINANCIAL</p>	<p>Avoid being a burden on my family.</p>  <p>PHYSICAL</p>	<p>Become more active & healthy.</p>  <p>PHYSICAL</p>
<p>Educate loved ones.</p>  <p>INTELLECTUAL</p>	<p>Master new skills or knowledge.</p>  <p>INTELLECTUAL</p>	<p>Make work optional.</p>  <p>OCCUPATIONAL</p>	<p>Pursue work with purpose.</p>  <p>OCCUPATIONAL</p>
<p>Nurture my relationships.</p>  <p>EMOTIONAL</p>	<p>Spend without guilt.</p>  <p>EMOTIONAL</p>	<p>Live in a better place.</p>  <p>ENVIRONMENTAL</p>	<p>Protect the environment</p>  <p>ENVIRONMENTAL</p>
<p>Dedicate more time to those I care about.</p>  <p>SOCIAL</p>	<p>Be more socially active.</p>  <p>SOCIAL</p>	<p>Volunteer my time.</p>  <p>SPIRITUAL</p>	<p>Help others live a more purposeful life.</p>  <p>SPIRITUAL</p>



In this session you will learn:

- How to introduce the values session
- How a values session should be run
- The top values card in Lumiant and what they could mean for clients
- The art of asking why?

James Williamson, Managing Director/Financial Adviser Millhaven Financial Services

- James is Managing Director of Millhaven Financial Services
- 20 years of experience in the financial services industry in Australia.
- Self Managed Superannuation Specialist Adviser with SPAA
- Millhaven is committed to providing the ultimate in strategic and technical planning, as well as servicing each client's unique ongoing needs.



<https://www.millhaven.com.au/>

James Wortley, CEO/Founder Enlightened Financial Solutions



- James has been working in the financial advice industry since 1998. On the 1st April 2007 he started his own financial advice business by purchasing his clients off Westpac under the Magnitude license.
- The business has grown substantially to 13 staff including 5 financial advisers. Business growth is running at 20-25% per annum. In 2018 Enlightened Financial Solutions became self licensed.
- In 2020, James was listed 46 in Barron's Top 100 financial advisers, FS Power 50 most influential financial advisers in Australia and FPA finalist in the Advice Innovation Award.
- Enlightened Financial Solutions have won many awards including a finalist in the FPA Professional Practice of the Year awards and finalists in 2020 IFA Excellence Awards for Self Licensed Firm of the Year and Innovator of the Year – Company.

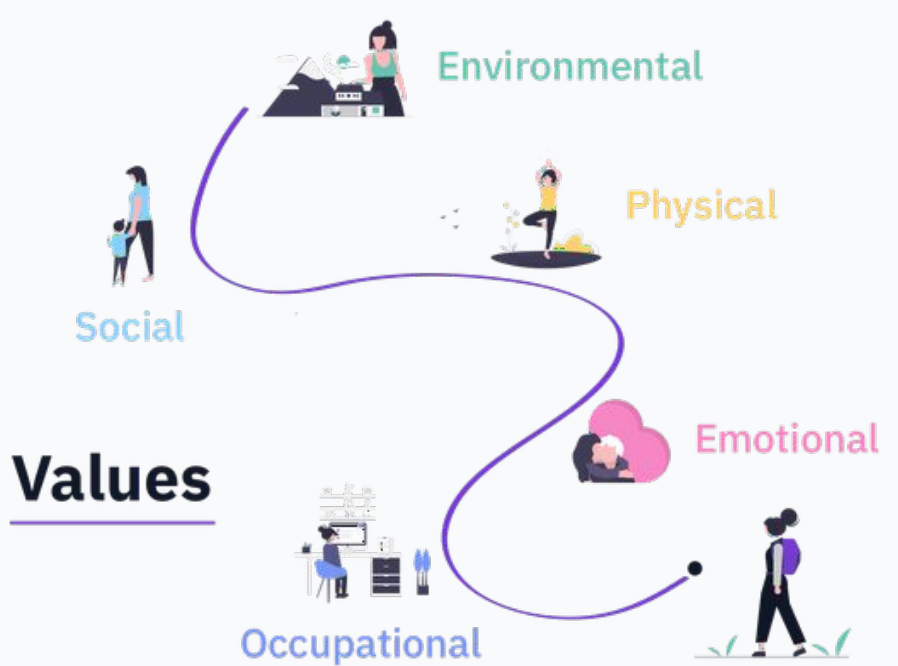


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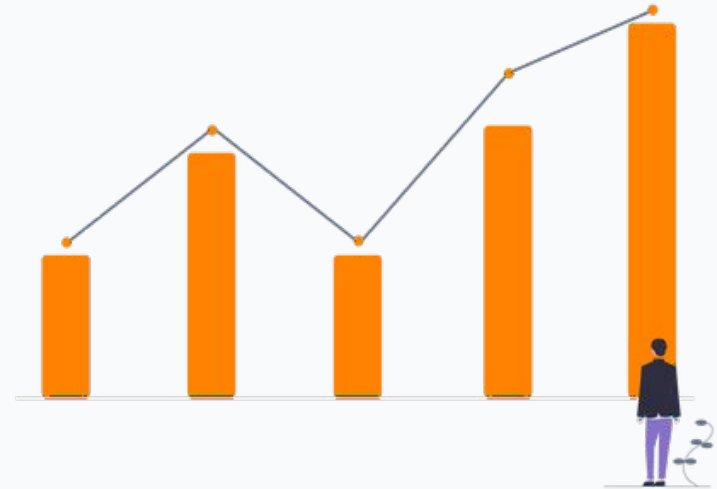
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What really matters?



Beating some index





Prior to your Values conversation...

- Acknowledge the reasons the client reached out and the ability to help them
- Address the client's burning issue
- Position the importance of getting a deeper understanding of the client
- Thank the client for completing the Your Life survey
- Acknowledge what the scores mean to you as an adviser
- Touch lightly on the client's results
- Reassure the clients over the course of your relationship you will solve identified issues and improve the client's ability to live their best lives
- Summarize the conversation
- Introduce the Values session
- Start the Values conversation

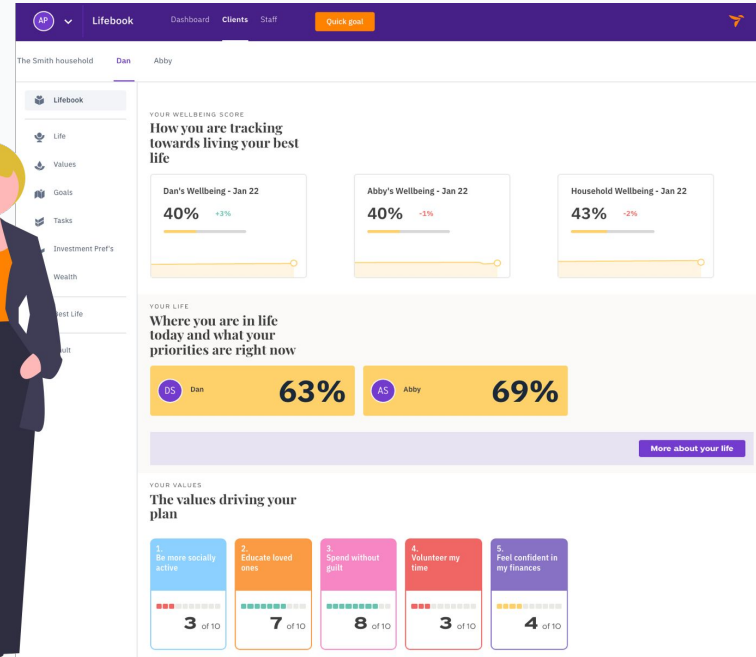
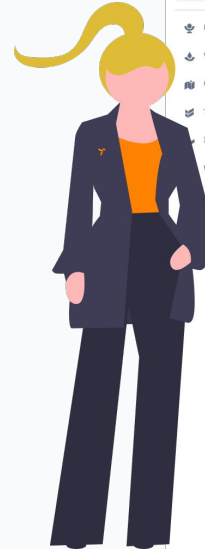


How to introduce the Values session

“We're passionate about understanding what your ideal life looks like. That's your whole life, not just the financial side. To help us do this, we're going to do a card exercise that will help us understand your key values.

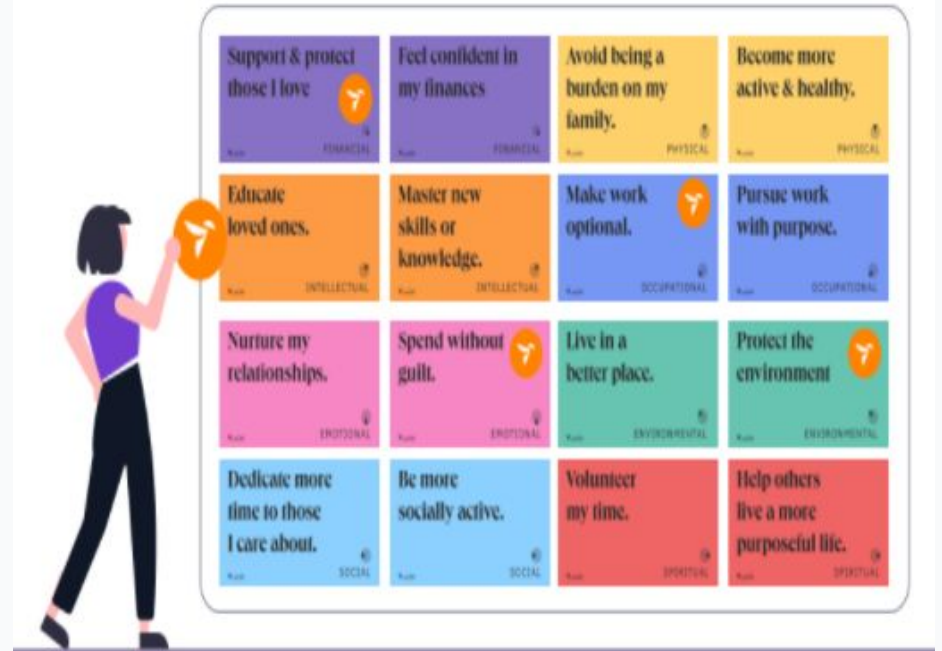
By understanding your values, it'll help us create meaningful goals which will become the guardrails of your financial plan to achieve your best life.

This is just the beginning, as we work together in the coming years, we'll keep coming back to these values as the foundation for your advice”





How to run a Values session



What do you think the Number 1 Values card is across the platform?



Spend without guilt

Nurture my relationships

Live in a better place

Protect the environment

Volunteer my time

Help others live a more purposeful life

Be more socially active

Dedicate more time to those I care about

Master new skills and knowledge

Educate loved ones

Make work optional

Pursue work with purpose

Avoid being a burden on my family

Become more active and healthy

Feel confident in my finances

Support and protect those I love

The top 5 values cards in Lumiant are...

[What are the Values Statements](#)

Support and protect
those I love

Feel confident in my
finances

Become more active
and healthy

Dedicate more time to
those I care about

Nurture my
relationships



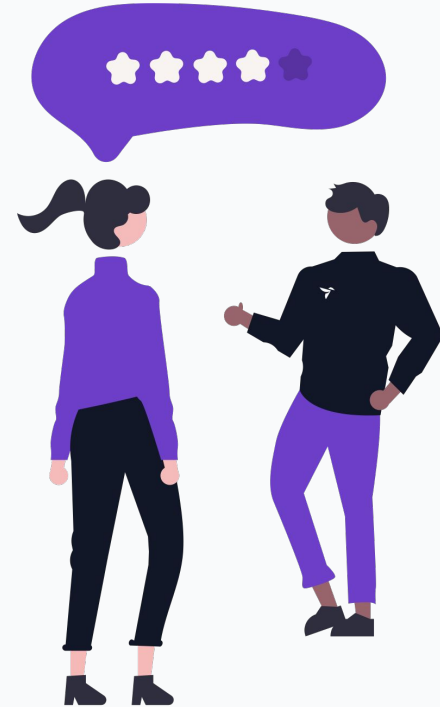
The Values



We want to drill down into

- What... the card means to them
- Why... they chose that particular card

We then ask them to combine their values to arrive at their 5 Shared Values, and then help them rate their progress for each value





What's important about _____ to you?

The art of asking why?



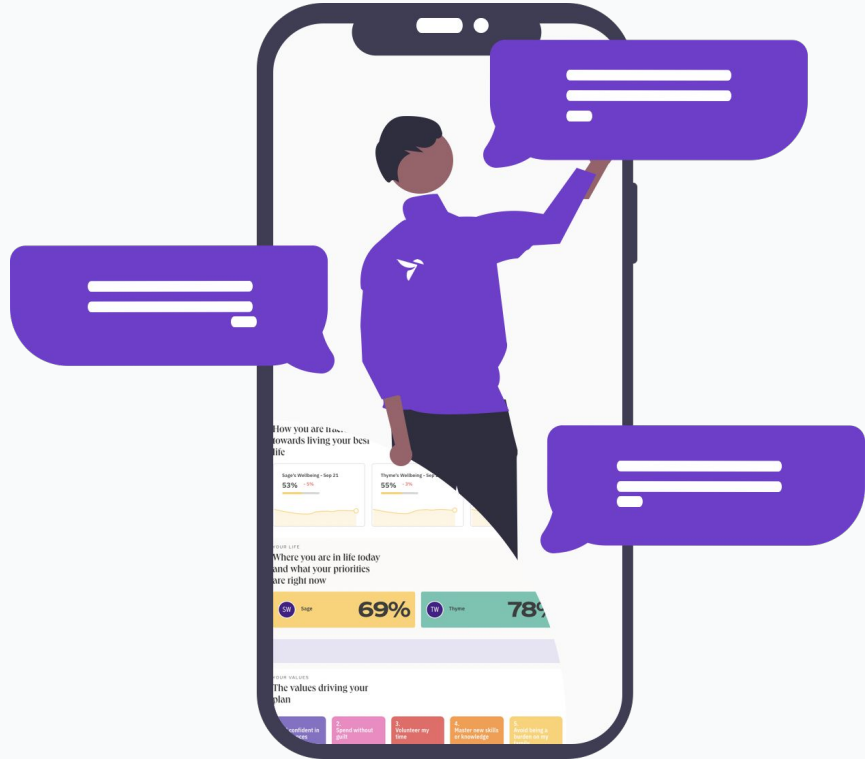
What does _____ look like to you?

3 simple questions



Tell me more about what made you pick _____?

Q&A





What's next?

Takeaways from this session include:

- You will receive a recording of today's session via email
- Lumiant [Values activity](#) to practice the art of asking why?
- Download Podcast- Lumiant Live with Mark Ciucci
- [The Art of Discussing Values - Spotify](#)
- [The Art of Discussing Values- Apple Podcast](#)



Thank you for joining us!

- For more resources, access our Lumiant Support Centre
- We want your feedback, spare a moment and complete the short survey
- More webinars on the way, so register when you can