

LUMIANT LIVE

WITH
MARK AKEROYD



The 10 traits of values-based advisors

Following Season 1 of Lumiant Live, Head of Customer Success, Mark Akeroyd takes a moment to reflect on the most common traits of his guests and what others could learn from them.



1.

THEY UNCOVER THE WHY



This is one of the most important traits of any successful values-based advisor - being able to uncover and understand the reasons why your clients have sought advice. These advisors recognize financial advice is about more than money and the best way to inspire action from clients is to connect their money to meaning.

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Mark
Ciucci

Ep. 8

Werner
Jansen

Ep. 10

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Ep. 12

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2.

THEY EMPOWER CLIENTS TO DEFINE THEIR STORY

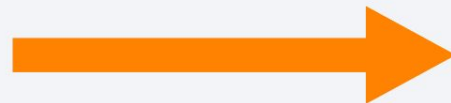


Values-based advisors take the time to get to know their clients by giving them the time, tools and support to define their story and unpack what it means to them. And, most importantly, they don't allow a single voice to dominate the conversation.

Want to hear how - check out these episodes:

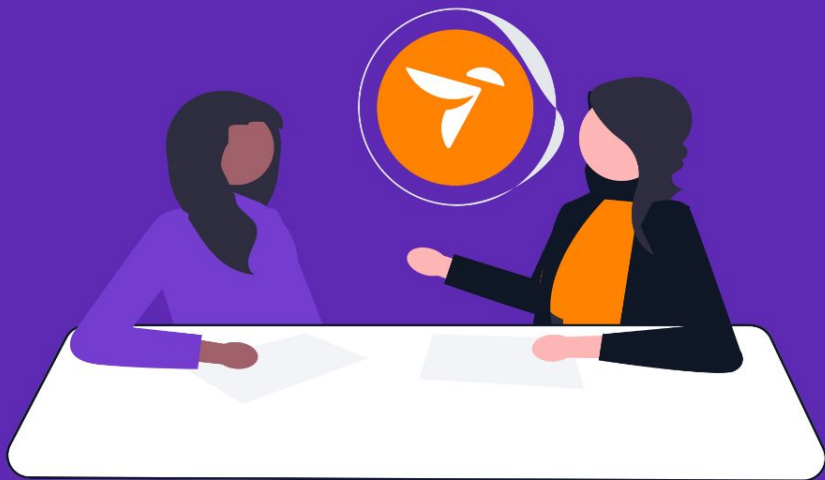
- Ep. 1**
James Wortley
- Ep. 6**
Andrew Zbik
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3.

THEY ASK GREAT QUESTIONS



The greatest skill any advisor has is the ability to ask great questions, listen to the answers and facilitate the conversations they have with clients. The best advisors aren't afraid to ask the emotional or hard questions that force reflection from the client, whether it be on financial or non-financial matters.

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David
Haintz

Ep. 3

James
Williamson

Ep. 5

Mark
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4.

CLIENTS CHOOSE THEIR EXPERIENCE

Values-based



Investment focused



Values-based advisors recognize clients are coming with a bias and that it's their job to unpack it. They expand their experience to be more holistic and life-focused, offering every client the opportunity to participate in their experience and ensure they at least give it a try before moving to a more traditional experience.

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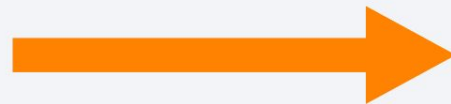
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5.

MASTERS OF BALANCING POWER



In values-based advice, everyone's voice matters. These advisors are masters at balancing the power across their communications - whether in meetings, emails or phone calls. They are engaging, empowering, and coaching their clients so they feel safe to explore the details of their financial plan and truly understand it. If someone's voice is too loud, they'll look to bring balance by letting others speak and be heard.

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Williamson

Ep. 6

Andrew
Zbik

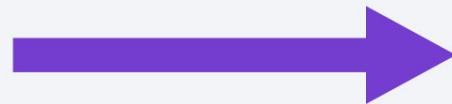
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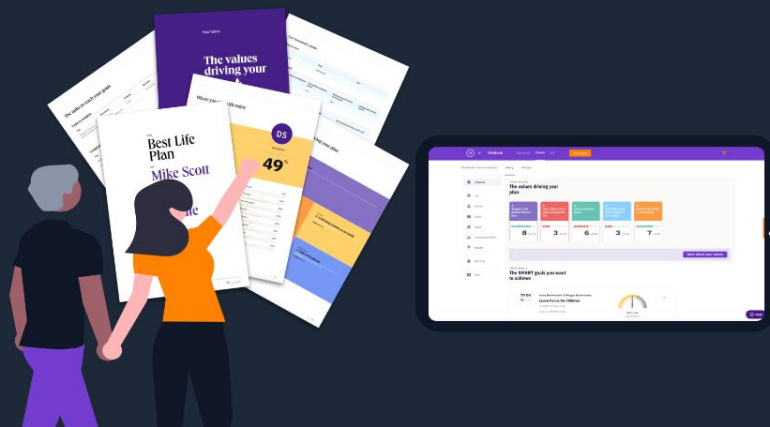
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6. LINK CONVERSATIONS TO OUTCOMES



Rather than focusing on purely financial outcomes, values-based advisers take a holistic approach and measure the success of their plans based on life outcomes. To ensure clients understood why they were taking this approach and how it relates to their plan, values-based advisers pre-position each step of the process and its meaningful impact on their lives.

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Pearson

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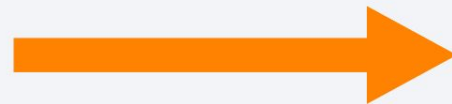
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7.

A GOOD PROCESS DELIVERS GREAT RESULTS



Having a strong, thorough and consistent process is critical in delivering great advice. Values-based advisors are always looking for ways to make processes more effective, mapping each stage of the process, ensuring they have the right documentation and content to hand and building the right tech stack to support them, all with the end client journey in mind.

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Haintz

Ep. 4

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Viskovic

Ep. 9

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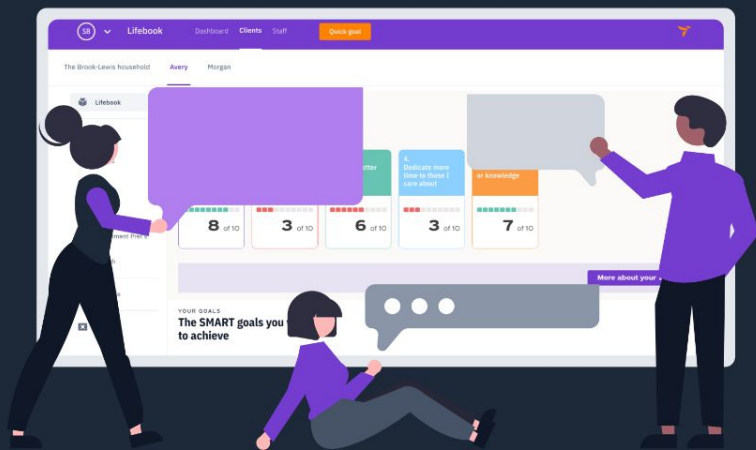
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8. DON'T UNDERESTIMATE CHANGE



Values-based advisors inspire change within their staff, involve them in the change and spend time to upskill their team. There is no one way to deliver values-based advice and each firm is different, with some even changing their team structure so they can embed a values-based experience in their business DNA.

Ep. 4

Sue
Viskovic

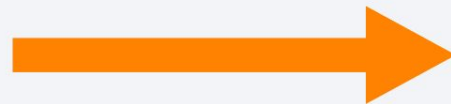
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9.

SEE THE BIGGER PICTURE



Values-based advisors are leading the industry, transitioning their value propositions from financial enrichment to life enrichment, creating a differentiated value proposition that attracts their ideal clients and new talent to the industry. Lumiant advisors see improvements in referrals, retention and revenue, as they regain the trust of the community by focusing their advice on the client, their lives and their values.

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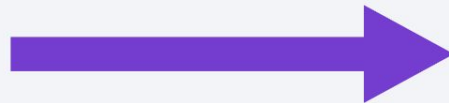
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10.

THEY KNOW & STICK TO THEIR BELIEFS



Great values-based advisors know their own values, their why and can articulate them passionately to clients. This permeates through to their ideal client value proposition, client experience and business plan. Clients see these advisors living and breathing their best life, whilst their advisors help them to construct theirs.

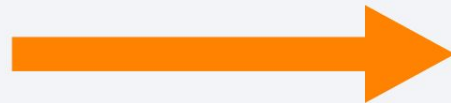
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ARE YOU READY TO BECOME AN ADVICE SUPERHERO?



Lumiant is an advice and client engagement platform that brings to life values-based advice in a visual and interactive platform designed to keep clients on track to living their best lives.

Through its values-based advice process, Lumiant transforms your extraordinary conversations with clients into tangible, structured and quantifiable actions and outcomes.

Using Lumiant values-based advisors are empowering their clients and their families to live their best lives confidently.

[Learn more at lumiant.io](https://lumiant.io)