BEHAVIORAL
INVESTING
INSTITUTE

BII BEHAVIORAL FINANCE COACHING PROGRAM

TRANSFORMATION

COACHING FROM THE BEHAVIORAL INVESTING INSTITUTE IS DESIGNED TO HELP YOU TRANSFORM YOUR PRACTICE SO THAT:

- Your firm, your client portfolios, and your communications are market agnostic
- Your clients can embrace the opportunities that many markets may present when viewed from a different perspective
- You measure success based on investor goals rather than solely based on benchmarks
- You differentiate your practice by becoming your client's behavioral coach
- You can create operational efficiency through decision making frameworks that scale & adapt
- You can use Toews' brochures, tools, and plans to assist you and your clients to become more invested in their plan

To schedule a consultation to learn more about the program and pricing, either visit our site: **biicoaching.com**, or contact Greg Brunck at (888) 457-7555 or contactus@biicoaching.com

FIRST 6 TRAINING CALLS: MONTHS 1-2

BEHAVIORAL PORTFOLIO DESIGN TRAINING

- Create risk-based portfolios that attempts to address behavioral and economic needs
- Embrace a market agnostic approach that may help you reduce speculation and behavioral biases
- Address best- and worst-case market scenarios
- Evaluate portfolios for potential sources of non-correlation
- Define portfolio components and the roles they could have played during different market cycles

BEHAVIORAL GUIDANCE TOOLS TRAINING

- Create framework for investment decision making
- Introduction and customization of the BII's behavioral toolset for attempting to manage investor behavior
- Discuss performance without discussing numbers
- Frame the risk landscape

GOALS BASED PLANNING (REDEFINED / REIMAGINED / RECONCEIVED / RESTRUCTURED / READDRESSED)

- Refocus client from benchmarks to future goals
- Stress Test* with outlier events using a broader range of events & market returns

CLIENT ENGAGEMENT CYCLE BUILDOUT

- Review current Client Engagement Cycle for on-boarding & modify to include behavioral guidance tools
- Develop processes for implementing with current clientele

*Stress Testing as described above consists of a Monte Carlo simulation rather than testing for liquidity of funds

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THEN 10 COACHING CALLS: MONTHS 3-12

GUIDANCE HELPING YOU EXECUTE YOUR BEHAVIORAL STRATEGY THROUGH YOUR INVESTMENT MODELS & YOUR PRACTICE

- **Review progress**
  - What have you stalled on and why
  - How can we kick-start your progress
  - What are you missing
- **Practice using the Behavioral Guidance tools**
  - Which are your go-to's and which ones need tuning
  - Teach someone so well that they themselves could teach others
- **Problem solve challenges and chart the goals for the following month**
  - That which can be measured can be improved
- **Discuss new techniques for helping clients**
  - Examine new behavioral research
  - Deeper dive on one topic per month from initial training
- **Examine new client challenges**
  - What tools apply
  - Have we been here before
  - What can we do to prevent a recurrence

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DISCLOSURES

The Behavioral Investing Institute is a for-profit entity that is registered as an investment advisor with the Securities Exchange Commission and is not an educational institution.

For additional information about the Behavioral Investing Institute, including fees and services, send for our disclosure statement as set forth on Form ADV by contacting Behavioral Investing Institute at 1750 Zion Road, Suite 201, Northfield, NJ 08225-1844 or (877) 863-9726.

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