Financial Freedom Planner™ for Financial Advisors

"A visually unique financial plan packaging system designed to create a powerful vision for clients and provide confidence about their future. The Financial Freedom Planner™ is designed to help you overcome the dangers of working for less than your worth, shortage of time and lawsuits."

Frequently Asked Questions

How long have you used the process?	Since 1996, we are on the 4th version of the Financial Freedom Planner™ (FFP) packaging system. We started marketing/licensing to other Financial Advisors in 2007.
What size office can use this?	Any size– a one person office or a team of planners.
How do you implement this process?	Step 1: After developing your personal FFP plan, deliver packaging system to a group of at least 10 top clients to get comfortable with the system. Step 2: Begin using the system for all new prospects. Step 3: Begin distributing to all fee-based clients and use to move transaction clients to fee-based clients.
Does this replace Sungard?	No. You will still use Sungard or your current financial software program. The FFP provides a more effective way to package Sungard materials into a client friendly strategy notebook.
Where are the training workshops held?	In our Tulsa office or via web-based session over the phone/internet.
Do we have to use FFP Binders?	No. Your choices are using a Raymond James notebook, your own binder or purchasing the FFP Marketing Kit CD containing binder templates.

Financial Freedom Planner™ for Financial Advisors

FAQ's Continued

How do we develop a FFP brochure?

You can hire your own artist and submit a draft to us and compliance for approval before you produce, or you can purchase the FFP Marketing Kit CD allowing you to easily reproduce yourself.

Are the materials compliance approved?

Yes. We have an established relationship with compliance and will make sure materials are approved and re-approved annually. We will submit the materials to compliance, and you will simply need to keep the compliance approval number on file each year.

For more information or to purchase the program

Please contact Jeremy Lott
800-970-9732 Ext. 2820
Or email: jeremy.lott@raymondjames.com

You can also access information on our website:
www.theefficientadvisor.com