

## BE A BETTER *ADVISER*

(Private Invitation)

**Become the Best of the Best - Get the training you need to embed yourself as the Most-trusted Adviser your best clients most need.**

### The Truth About Your Clients' Current Position

The truth is your clients' succession plan is not all that it could be, especially if they have a *discretionary* trust. It is almost like the word "discretionary" is invisible to other Advisers. The discretionary aspect creates legitimate fear that what the family want to happen is subject to the exercise of an unknown future discretion. The Murdochs are not the first and will not be the last to struggle to share such a trust. Adult children with different skills, trajectories and spouses are unlikely to smoothly step up together and make big financial decisions easily. If even one of the beneficiaries is living overseas, they will have a very different tax position, creating a lot of unresolved conflict that no-one has even thought about managing, let alone tried to manage. Most estate plans force these adults into this position and they do not like it!

By defusing the ticking time bomb your clients did not even know was there, the family will be all ears for your knowledge. Showing them you are looking around corners for them will generate trust and comfort knowing you are there walking with them. They do not know how far you can see but, with our long exposure and deep experience of managing these problems, you will be many steps ahead of them. We will introduce you to international experts who have been doing this long before us in societies who have wrestled with these issues for hundreds of years.

When you discover and then replace a problematic issue (that your client incorrectly thought was benign), with a plan that they co-create, design and "own", you will be the Most-trusted Adviser in their camp.

As part of the program, we will also solve the two biggest problems that stop existing Advisers from developing into Most-trusted Advisers, i.e. what stops them from being the Best Adviser to three generations (and even more) of a family:

#### **1. Your lack of confidence to check the client's homework and even criticise other Advisers' work.**

Your client does not know they have a problem. Their existing plan does NOT work for their family, and they have no idea about this or how to start fixing it. *Your* problem is you don't fully know how to help them solve it yet.

No-one they know yet is qualified to help them with this. Some people (most professionals) are allergic to certain discussions and that may be why the gap has been unaddressed until now. By pointing out the problem that no-one else did, you are the brave heretic saying, "with respect, the Emperor has no clothes".

## 2. You don't yet KNOW the solution.

The truth is you do not yet know the solution to their succession problem and that is a problem for you. Without the skills and a map of the road ahead, confidence in any proposed solution or course of action is misguided and those expressing it are found out. It is a human problem attempting to be fixed by legal documents. Of course, it cannot work!

The family has many resources but a solution that works still eludes them. While you have not done this before, you sense (but do not know for sure) that the solution can be uncovered from the pieces of the puzzle. The fact you have not unearthed it by now is unsettling. Without a guide experienced in solving these human problems, you know the family are unlikely to get a better result.

I'll be working with a handful of people over the next couple of months (it's an **8-week program**) to guide you on track to become the best family Adviser possible.

### Program & Your Results

The training gives you my learnings since being invited to act for two billionaires over a decade ago. I realised I was not confident that my previously successful strategies would actually work for them. I knew it would work for successful middle-class families as that was confirmed by data and experience. But would it work for very complex families where the options were numerous, and politics and agendas were in play?

The purpose of the program is to bridge key gaps in your knowledge, capability, and offering to your top clients, thus improving your confidence and accuracy in your approach and advice. Your clients may not know this, but by addressing these gaps you will also remain ahead of them in terms of what they need to know about, meaning the value you offer will always be prized by them as being just that – valuable. When your client knows that their guide is ahead of them, it is comforting because it gives them confidence.

Outcomes you will get from this program include:

- Diagnosing and understanding how much needs to be done for the family to achieve their fundamental goals;
- Becoming qualified to assist them to achieve their most important goals;
- 8 weeks with other great Advisers who “get it” and will support your growth;
- Having what it takes to be the one who is asked to do the work with these clients;
- Being able to do the work for them and building your alliances; and
- Being inside a network that supports you as you continue to grow and successfully deal with similar types of obstacles with confidence.

Upon completion of this program, you will have the confidence and know-how when talking to the principal of an UHNW family *and their children* ensuring they actually listen and act on your advice so that the essence of what is most important to them actually happens. You will also know how to go about getting into the conversations in the first place!

These families cannot do this for themselves. They need you to help them. You can start a project with your favourite client during this program, one that you would like to work with long-term. Your enquiries with this client will immediately deepen your relationship.

Usually, by developing this 'project of the family', the family members come up with more ideas that need exploring and developing (like a philanthropic initiative, an age-appropriate development step for younger children etc). The second mountain can be as much work as the first!

Also, once you start, you will need to recalibrate the roadmap for the *actual* issues that arise as they are rarely exactly as we thought. Train them to flourish together (which includes corralling them to have a shared vision, plan and skills when the plan hits a bump e.g. new spouses) with the understanding of sensitive family dynamics that you will now have brought to light.

You can be the one to point out that the other Advisers have kicked the can down the road and are relying on hope, good luck and goodwill that the next generations can handle it (being the biggest asset transfer (among untested people they love) that the family may ever see). You will pick up the can for them, turn the can into a baton and prepare the relay team to pass the baton, efficiently, if not well. Future generations will thank you for doing this with them.

### **The Be A Better Adviser Program**

We will meet by zoom every Thursday for 8 consecutive weeks - at 5pm AEST from 11 June 2026 and video the sessions for those who cannot attend or want to rewatch them.

Each week, we will cover a different step in your path to become the Most-trusted Adviser for a small number of your key and favourite clients.

**First**, after sharing which clients to avoid (as not every client is suited to this work and you may want to get some easier runs on the board early on), we will help you to develop your pipeline of ideal clients to consider.

**Next**, we will show you how to gather and read their key governance documents. If you need legal advice, we can give that to you, but the whole point of the program is that you can point out the problems to your top clients and they then happily engage other professionals to support the work you are doing for them.

**Then**, we will teach you how to get far ahead of your best clients and bring them along to a place no-one has asked them about, the place where they can enjoy the fruits of their hard work together.

#### **Here's how everything will work:**

Over the eight weeks, I will share stories to inspire and explain the journey, direct you to kit to assess the landscape and provide the tools to climb the new mountain in front of you. For some, this is your second mountain - your first one being your traditional profession. This new (second, third even!) profession is a new one, but potentially your most rewarding one of all. This is all about you becoming the Sherpa for your favourite clients.

**The program and fee also includes a private consultation with me to review the client's existing documents which should create the need in the client's mind to hire you.** Investment - The entire program is AU\$2,400.00 plus GST.



Donal Griffin