



The Transformative Advisor™ Webinar Series

Session 1: Overcoming the Barriers: The Pathway to Transformative Advisory Work

In the opening webinar of this four-part webinar series, Joe defines “Transformative Work” and provides three practical areas of focus for The Transformative Advisor: Financial, Operational and Technology Advisory.

During the webinar, Joe also addresses challenges to playing a transformative role clients and ways to address those challenges (e.g. “Overcome the Barriers”), including three quick and practical (but high impact) options for attendees to perform immediately with their clients.

During this session you will learn:

- The nature of Transformative Advisory Work
- Four Reasons to Engage in Transformative Advisory Work
- Three Key Areas of Focus for the Transformative Advisor
- Seven Challenges to Transformative Advisor Work and How to Address Those Challenges
- Three Simple but High Impact Steps You Can Take *Immediately* to Have a Transformative Impact on Your Clients

Program Level Basic

Prerequisites None

Field of Study Business Management
Services

Cost Free

**Advance Preparation
Needed** None

Delivery Method Group-Internet Based

Recommended CPE Credit 1 credit

Complaint Resolution ecolley@woodard.com