1. DOWNSIZING vs RIGHTSIZING...What’s the Difference?


Understanding an Aging Generation: The Stats are Staggering!

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Notes:


2. Defining the RIGHTSIZING Timeline...Where Do They START?


Counteracting “FEAR of Loss” ...It’s Much MORE than Money!

• Reference: __________________________________________________________
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Becoming Their Trusted Advisor ... *Emotional Selling or Emotional Support?*

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Creating a **RIGHTSIZING** Checklist!

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<th>Step by Step</th>
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3. Developing a Team of RIGHTSIZING EXPERTS...Who Makes the Cut?

The RIGHTSIZING process requires a village! What experts are needed to meet ALL of the specialized needs of your RIGHTSIZING Client?

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Notes:
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It’s a FAMILY AFFAIR... and Friends and Neighbors and Advisors!

4. MARKETING INSIGHTS... Making a Connection with the RIGHTSIZING Generation

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Developing a Rightsizing Seminar... What is the BEST idea you have for creating value for those who attend?
Building VALUABLE Connections in the Aging Community…

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5. WRAP UP… Are you IN… or are you OUT?

- Are you willing to spend the time, effort and emotional energy necessary to provide specialized service this particular generation of Baby Boomers and Mature Clients?

- If so, what will be your 30 day plan to get started?