ELEVATING YOUR HIGH NET WORTH (HNW) ADVISORY MASTERY WITH CFP EXCELLENCE

1-DAY PROGRAMME
9:00AM - 5:30PM
COURSE FEE : $500
(IBF FUNDING AVAILABLE)

STEVEN YAM

MDRT QUARTER CENTURY MEMBER
CIAM, ChFC, CLU, FChFP
PRINCIPAL TRAINER, COACH AND MENTOR

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ADVENT CONNECT PTE LTD
REG. NO. 201605155Z

STEVEN YAM

CIAM, ChFC, CLU, FChFP

PRINCIPAL TRAINER, COACH AND MENTOR

ENQUIRY

+65 91833647

admin@adventconnect.com.sg

EDUCATION

- **Chartered Insurance Agency Manager**
- **Chartered Financial Consultant**
- **Chartered Life Underwriter**
- **Fellow Chartered Financial Practitioner**
- **Newfield Coach**
- **Gallup Coach**
- **Certificate for Family Office Practitioner**

AREA OF EXPERTISE

- Tranformational Trainer
- Leadership and Performance Coaching
- Soft Skills and Emotional Intelligence Training
- HNW Market Engagement
- Mindset Shiofts for Breakthrough Results
- Effective Communication
- Platform Speaking and Inspirational Training

PROFILE

Transformational Coach | MDRT Quarter Century Member | 42 Years in Insurance Sales & Leadership

Steven Yam is a veteran in the insurance industry with over four decades of success in sales, leadership, and human development.

With 42 years of experience—including 22 years as a dedicated mentor, coach, and experiential trainer—Steven has empowered thousands of financial professionals to break through barriers, redefine their success, and create lasting impact in both their personal and professional lives.

A Quarter Century Member of the prestigious Million Dollar Round Table (MDRT), Steven has consistently exemplified excellence, having served and inspired top producers across Singapore and the region. His career is marked by an unwavering commitment to growth, authenticity, and transformation.

As a transformational trainer, Steven designs and facilitates powerful experiential workshops that go beyond technical skills. His unique training style blends heart, honesty, and deep reflection, challenging participants to examine their mindset, beliefs, and behaviors. Through his guidance, advisors discover their inner strength, reconnect with their purpose, and gain the confidence to take bold, authentic action.

Steven believes that extraordinary results don’t come from doing more, but from being more. In his programs, participants don’t just learn—they awaken. They leave with clarity, courage, and a renewed vision for their lives and careers.

1-DAY HIGH NET WORTH (HNW) MASTERY PROGRAM

ABOUT THIS COURSE:

Imagine having the frameworks, skills, and confidence to connect with affluent clients, build lifelong trust, and guide them through complex financial decisions using the CFP® process. This immersive one-day program empowers financial consultants and wealth managers to position themselves as indispensable advisers to HNW individuals.

Designed around real-world application, behavioural insights, and client-centric planning strategies, this workshop blends technical knowledge with emotional intelligence to help you unlock exponential growth in your business and relationships.

WHO IS THIS FOR:

- Financial Consultants
- Wealth Managers
- Senior Advisers aiming to deepen trust and share-of-wallet with HNW clients
- Professionals seeking to integrate the **CFP® financial planning framework** into the affluent advisory spac

LEARNING OUTCOMES:

Participants will be able to:

- Understand the behaviours, values, and expectations of HNW clients
- Integrate the CFP® six-step process effectively into HNW engagement
- Build authentic personal brands that appeal to affluent individuals
- Apply emotional intelligence to drive deeper, long-term client relationships
- Gain confidence in leading transformative client conversations and strategies
- Leverage real-world case studies to overcome barriers to trust and influence
- Craft actionable positioning and prospecting strategies tailored to the HNW market

Course Fee & IBF-FTS Funding

Course Fee: S$500.00 per participant (includes materials and venue)

IBF-FTS Co-Funding Eligibility

- **Singapore Citizens aged 40+:** 70% co-funding
- **Other Citizens/PRs:** 30% co-funding
- **Funding Cap:** S$500 per participant

1-DAY HIGH NET WORTH (HNW) MASTERY PROGRAM

Module 1: Building the Foundation for HNW Success

Welcome & Vision Setting
- The untapped HNW opportunity
- The transformational shift: From planner to trusted adviser

Understanding the HNW Client Landscape
- Characteristics and behaviours that define the HNW profile
- Key decision-making drivers in HNW households
- Introduction to the CFP® process as a strategic advisory tool
- Barriers to trust and how to overcome them

Personal Branding & Strategic Positioning
- Define your strengths and craft a compelling brand that resonates with affluent clients.
- ***Exercise***: Define and refine your HNW brand positioning

BE – DO – HAVE Framework for Adviser Alignment
- Identify identity gaps and behavioural bottlenecks
- Map your transformation into a high-impact HNW adviser

Real-World Application & Case Studies
- ***Mini-scenarios***: Breaking into the HNW market
- Lessons from top-performing advisers
- Using the CFP® framework to position advice with clarity and depth

Module 2: Elite Client Engagement Masterclass

Psychology of HNW Clients
- Emotional vs. rational needs in wealth decisions
- What HNW clients really value in an adviser
- Anchoring trust in legacy, purpose, and control

Understanding the HNW Client Landscape
- Tailoring communication for different client archetypes
- ***Role-Play Practice***: Building trust from the first meeting

Strengthening Long-Term Client Relationships
- Building lifetime engagement journeys
- Positioning advice around family, legacy, and philanthropy

Advanced Market Positioning
- Creating niche propositions for HNW segments (e.g. business succession, wealth transfer)
- Collaborating with other professionals (lawyers, tax advisers)

Reflection & Q&A
- Recap of key takeaways and mindset shifts
- Guided self-assessment and action planning

Online Assessment
- 30-minute post-training online assessment
- Mix of MCQs and scenario-based questions