Program to Develop Deep, Long-Term Relationships with Affluent, Discerning Business Owners, Executives and Professionals

Successful Transition Planning Institute's unique content, online self-assessments and guidebooks help you attract and engage the right clients.

CAMBRIDGE, MASS, US, February 26, 2019 /EINPresswire.com/ -- Successful Transition Planning Institute announces a new strategic alliance program whose awareness/take-action engagement tools help you:

• Differentiate yourself by providing you access to a proven methodology to motivate business owners to plan their business succession which positions you as the financial firm that they chose to invest their liquidity events.

• Develop more “touch points" by working with prospects and clients to help them solve their business and financial needs.

• Create deeper engagements by having permission to use the Institute’s targeted relevant content:

The educational content of the reputation-based marketing system consists of: author readings, co-branded books, marketing collateral and permission to use transition facilitation articles, blogs, book chapters and white papers.

 Engaging Online Self-Assessments for Lead Generation for:

— Baby Boomer Business Owners

In the subscription aspect of the alliance program, you will have unlimited access to the What’s Next? Self-Assessments™ for baby boomer business owners, a proven, innovative online assessment tool that provides in a clear and organized way a framework for them to objectively know their motivations for wanting to leave, their transition goals and their attitudes and expectations, It also provides qualitative data which allows them to determine how emotionally prepared they are for leaving and if they have plans for meaningful new lives after they leave their companies.

— Affluent, Discerning Late Career Executives and Professionals:

You will also have unlimited access to the Explore self-assessment which provides an organized place for executives and professionals to find peace-of-mind and begin planning what to do with the next chapter of their lives.

Guidebooks to Create Long-Term Relationships:

Money will be moved when people experience a major life transition such as being divorced, loss of a loved one, leaving their professional career or business etc. As part of the alliance you will have access to guidebooks that create an opportunity for you to participate in the process when money is being moved and reduce the risk that assets will be moved away to competitors when clients experience major life transitions.

For more information about STPI's unique content, online self-assessments and guidebooks to attract and engage the right clients, please visit the alliance website:
www.successfultransitionplanninginstitute.com.

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