



Book a meeting with The Personal Coach

Accomplished advisors not only seek ways to enhance their businesses, but also reflect on their personal journeys, contemplate the next steps in their careers, and plan a future business exit on their own terms.



THE PERSONAL COACH

1

Discovery process to identify your business objectives.



2

Vision exercise to understand business gaps and next steps.



3

In-depth meeting with you to explore business insights and options.



4

Assessment outlining recommendations and steps to create your strategic plan.



Your life's work deserves a plan

The maximum fee for steps 1 through 4 is \$3,500. Equitable® will reimburse 50% to an individual maximum of \$1,750 for pre-approved advisors. Please speak to your Equitable representative for approval.

Advisors will make full payment to The Personal Coach, and then submit their receipt to Equitable for reimbursement within 4 weeks of the receipt date.

Advisors that proceed beyond step 4 are personally responsible for any costs.

Equitable reserves the right to alter or withdraw this offer at any time without notice.

Book your complimentary consultation to see if an assessment is right for you:

www.thepersonalcoach.ca/equitable