

Working with Remote Clients No Matter Where They Are

Wednesday, April 17, 2019 at 7 p.m. Eastern

(6 p.m. Central, 5 p.m. Mountain, 4 p.m. Pacific)

Registration Ends April 10

*CEUs for PDMM® recertification are not available with this webinar

You've heard that some Daily Money Managers work with clients from the comfort of their desks and in their pajamas. Yet, you get dressed and drive to your client's home or office. **How do they do it???** Are they able to increase their client load? Do they charge differently? Join us as Lynn and Debbie, both veterans of working from their home offices for clients they don't see, tell it all. They'll share their secrets to success and the challenges they face.

In this webinar, you'll learn:

- How remote/virtual client work is different from face-to-face client work
- Hybrid clients - when you can do work remotely *and* still need to see them
- What you do and don't do for a remote client
- Structuring your own business processes to work virtually
- Tech tools to use - even if the client isn't tech savvy
- Positives and negatives of remote work
- Marketing to get remote clients

Intended Audience: AADMM members who have some clients already and are looking for a way to service those clients in a different way.

Presenters: Lynn Plait and Debbie Gilster

Lynn Plait, Principal of Financial Order, LLC, began her work as a DMM 18 years ago. During her career in banking, Lynn particularly enjoyed working with high net worth clients. Since they were rarely home, she began doing some of their work from her own home. The big surprise was the flexibility that came from remote work. Fewer work clothes, less time in traffic, and with tech tools, the ability to work from just about anywhere! In 2017, she moved cross-country and was able to retain her clients even though they were miles away. Using Dropbox, Facetime, and more, she makes it look seamless!

Debbie Gilster is the Co-Founder of At Home FinanceCare, LLC, a DMM agency firm that helps individuals and small businesses keep their everyday affairs in order - starting with their finances as the foundation. While she still sees some clients, the majority of her client work is done at her desk, on her own time schedule (so she can be on the golf course in the day time!). It requires some tech tools and organization which she has fine-tuned over 20+ years. She's happy, the client is happy - it's a win-win!

Registration: The deadline to register is **April 10, 2019**. Register online or complete the PDF registration form and mail, email or fax to: AADMM Registration Office, 174 Crestview Drive, Bellefonte, PA 16823, Email: registration@aadmm.com, Fax: 814-355-2452.

Note: Registration is for one entrant. Any other individuals who would like to join this session are required to complete their own registration forms. The registration fee is set per person, not per connection.

Confirmation: Registrants will be notified on how to participate in a follow up email.

AADMM Webinar Registration

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Yes, I am registering for: **Working with Remote Clients**

No Matter Where They Are

REGISTRATION DEADLINE is April 10, 2019

Fees:

NO REFUNDS will be made for cancellations after the registration deadline.

PDMM rate at \$50 \$ _____

AADMM member at \$65 \$ _____

Non-member at \$85 \$ _____

Total amount of payment \$ _____

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