Delaware Life

Delaware Life Income Planning Institute℠

Does teamwork still make the dream work?

The use of the team model for financial professionals remains a growing trend in the industry to better serve client needs and expand business opportunities. However, not all teams are successful. The recent pandemic, increasing use of technology, and changing organizational structures, among other things, have changed the nature of how teams operate and, in some cases, have caused once successful teams to deteriorate.

In this workshop, attendees will be introduced to Patrick Lencioni's Five Behaviors of a Cohesive Team® model for team development, and learn about:

- The current state of teams
- The consequences of ineffective teams
- A proven model for building and maintaining a cohesive team and developing a team culture
- The three areas of focus of the fastest-growing advisory teams:
  1. Acquiring new clients
  2. Delivering value
  3. Managing the practice as a business

Developed by Delaware Life's in-house subject matter expert, Anders Smith

As the Managing Director and Head of the National Sales Consulting team, Anders sets the strategy and vision for the team, assisting financial professionals and wholesalers with retirement income planning strategies that focus on risk management, distribution, and tax planning. He also consults with sales and management leaders to build stronger, more effective working relationships, enhance efficiencies, and increase sales productivity.

With over 37 years of industry experience, Anders is a highly qualified professional, having earned the CERTIFIED FINANCIAL PLANNER™ (CFP®), Certified Investment Management Analyst (CIMA®), Chartered Private Wealth Advisor (CPWA®), Retirement Management Advisor (RMA®), and Retirement Income Certified Professional (RICP®) designations. He is also an Everything DiSC® and Five Behaviors of Cohesive Teams® certified instructor.

Anders is committed to helping financial professionals enhance the value of their services to gain a significant competitive advantage. His dedication and passion for the industry make him an asset to Delaware Life Marketing and a valuable resource for financial professionals seeking guidance and support.

98%

of executives feel building team skills is worth the time.

Wiley's Workplace Learning Solutions Survey

Author: Anders Smith, CFP®, CIMA®, CPWA®, RMA®, RICP®
Vice President,
Managing Director,
Head of National Sales Consulting

About National Sales Consulting (NSC)

The NSC team provides advanced sales and planning expertise on a variety of income, tax, estate, and financial planning topics along with actionable ideas and resources for effective client engagement. They also consult on business development topics including sales training, team building, and leadership development. Their ideas are rich in education and their practice management strategies help simplify complex planning issues for clients. The team's objective is to help financial professionals be successful and create a competitive advantage.

About Delaware Life

We've made it our mission to deliver value and results to everyone we work with by:

- Building our client-focused products with straightforward features, appealing indexes, and reasonable fees—plain and simple.
- Making products available to knowledgeable financial representatives who deliver those products with clarity and integrity to help clients make smart decisions to protect their savings and build for the future.
- Creating a seamless, accurate service experience you can rely on from the first moment you contact us.

For more information on these strategies, please contact the Delaware Life National Sales Consulting team at:

- **844.DEL.SALE (844.335.7253)**
- **SalesSupport@DLMarketing.com**

Visit the Delaware Life Income Planning Institute℠ website at advisors.delawarelife.com. (First-time visitors will be asked to register.)

delawarelife.com

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