

FUTURE LEADERS PROGRAM FOR ADVISORS

Adapt, Connect & Lead Through Every Conversation

4-Hour Interactive, In-Person Leadership Development Experience

COMMUNICATE WITH IMPACT

Great leaders create clarity, build trust, and know how to adapt their approach to the people and situations around them. In financial services, these skills are essential—not only for building strong client relationships, but for influencing, collaborating, coaching, and leading others.

The Future Leaders Program, is an interactive experience designed to equip financial service leaders with practical communication and feedback skills they can immediately apply with clients, colleagues, and teams.



SESSION EXPERIENCE

This experience, led by CEO and Founder, Dr. Ben Sorensen, brings together two essential leadership capabilities: adapting to different communication styles and navigating conversations that matter.

Participants will gain practical tools to communicate with greater impact, give effective feedback, strengthen accountability, and build stronger relationships.

Together, these skills help future leaders communicate with confidence, build trust, and lead more effectively.

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COMMUNICATION STYLES

Recognize. Adapt. Connect.

Future leaders will explore four common communication styles and learn to recognize the verbal and behavioral “tells” that can reveal how others prefer to communicate.

Through interactive exercises and financial services-relevant scenarios, participants will build the self-awareness and adaptability needed to communicate with greater impact.

Future leaders will learn to:

- Recognize different communication styles and adapt their approach to individual needs.
- Strengthen self-awareness, active listening, and relationship-building skills.
- Build trust and credibility with clients, prospects, colleagues, and teams.
- Communicate with greater clarity, confidence, and intention.
- Navigate differences and reduce friction in challenging situations.
- Foster stronger collaboration and more productive team relationships.
- Strengthen ability to influence, collaborate, and lead as responsibilities grow.

CRUCIAL CONVERSATIONS

The SPOT Feedback Method

Future leaders are defined not only by what they know, but by how they show up in conversations that matter. In financial services, every interaction—from supporting colleagues and staff to coaching team members and serving clients—can shape trust, confidence, and performance.

The SPOT Feedback Method provides a practical framework for future leaders to deliver feedback, address challenges, and strengthen accountability while maintaining strong relationships.

Participants will learn to communicate with greater confidence and professionalism, helping them show up as the leader they want to become—across every client, team, and workplace interaction.

Participants will learn to:

- Deliver clear, timely, and constructive feedback.
- Navigate challenging conversations with confidence and respect.
- Strengthen accountability, ownership, and follow-through.
- Coach and support colleagues and team members toward stronger performance.
- Maintain trust and professionalism in client and internal interactions.
- Build a culture of open communication, collaboration, and continuous growth.