For Financial and Legal Professionals

Initiating Crucial Conversations

A Presentation for Your Clients by Speaker and Author Helga Hayse who will:

- ***Increase your business.***
- ***Add value to your services.***
- ***Expand your client base.***

What Your Clients Need

As the population ages, boomers and their parents will be facing many unresolved relationship issues. Both generations avoid talking about uncomfortable subjects like money, death and end-of-life issues. They need help in initiating these crucial conversations with the people they love before it's too late.

Legacy Deals with Emotion

Financial and legal professionals deal with law, logic and numbers. Planning for legacy is about emotions. Helga Hayse creates the emotional urgency needed to start these crucial conversations. Your work will be easier, more satisfying and comprehensive when clients are receptive to your suggestions.

The only thing we can control is to plan for the things we can't control.

Helga Hayse teaches family members how to talk productively about touchy subjects like money, death and regrets. Her presentation includes:

- How she survived sudden widowhood through planning
- How longevity and finances impact each other
- Why money and death are hot button subjects
- How to raise difficult issues respectfully
- Why crucial conversations matter

Her emotional and urgent message is:

Work with your legal and financial professional to make sure your planning is comprehensive.

Helga Hayse is a professional speaker and the author of "Don't Worry About a Thing, Dear" – Why Women Need Financial Intimacy. She leads seminars about financial intimacy in marriage and has worked with Merrill Lynch, Allstate Life, New York Life, Borel Private Bank & Trust Company.

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An Overview of the Program

- Your clients and their friends attend a social event with light refreshments.
- Speaker and author Helga Hayse delivers a dynamic interactive talk about the importance of families openly discussing financial issues and legacy.
- All attendees receive a copy of Helga's book, "Why Women Need Financial Intimacy." The book reinforces all of the presented information.
- The book is your gift to the attendees and will have your firm's logo on the cover.
- You are present to answer technical questions.
- You follow up with attendees for additional services.

Client Comments

"Your presentation was very well received and we've gotten great feedback. People can definitely feel your warmth and the authenticity of your experience. It was great to have your book as a giveaway."

Dave Shore, Principal,
Marin Financial Advisors, LLC

"The message you delivered was so personal and important. It appeared that those who attended found the experience extremely valuable."

Sherry Kenny, Merrill Lynch
Insurance Group

"I've worked and taught financial services for a generation, working with many bereaved widows. This was the most cogent appeal for estate planning ever heard."

Richard Charles,
New York Life Insurance

For details and availability contact Helga at

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