Welcome, Financial Advisors. I'm glad you're here! My name is Scott Miller, a Certified Professional Retirement Coach.

When I transitioned from a fulfilling 32-year career in dentistry, I embarked on a meaningful journey when I joined a leading wealth management firm in July of 2021. This started a new chapter in my life, and this shift ignited a new purpose in me — and that was to support financial advisors and their clients by providing essential tools for success in a competitive landscape.

I now lead Refocus Coaching, and we've been fortunate to gain recognition from respected platforms like Michael Kitces's the Financial Advisor Success Podcast, Forbes Advisor, and even THE CBS Evening News! This service is a game-changer for financial advisors, helping them thrive in today's crowded industry.

I'm so excited that you're here to learn and gain tools to support your firm's clients as they transition to a purpose-filled retirement.

Many of your clients today might be asking questions like:

- "What will retirement really be like?
- "What am I going to do in retirement?"
- "How do I make the most of my time in retirement?
- "How can I leave a legacy?"

After you complete this course, you'll be able to insightfully answer EACH of these questions, and so much more!

This course is designed to support you as you guide your clients toward a fulfilling and meaningful retirement. While you're well-educated in their financial matters, this course bridges the gap by focusing on the non-financial aspects, ensuring a more holistic approach to retirement planning.

Let me say that again: This course focuses on the non-financial aspects of retirement planning.

Retirement is no longer a destination - but a journey.
However, there's a disconnect between what pre-retirees expect of retirement and the reality. They have no idea of what's coming. But you have the opportunity to guide them towards a purposeful future.

Here's what you can look forward to gaining once you've completed this course:
First: "Expertise in non-financial retirement planning" … You will be able to guide clients through this major life transition of retirement towards meaning and purpose.
Next, "Gain a Competitive Edge in the Industry." This course will give you an added service that many other advisors aren't doing. Clients are asking for this as part of their retirement planning because they want a more holistic approach.

Another key advantage is in developing “Stronger Client Relationships.” Building trust is at the core of client connections, and this course emphasizes caring for the non-financial aspects of their lives. By addressing their broader concerns, you'll enhance your firm's client retention and foster even more referrals (which is so important in this industry). Clients will share with their friends and community how you, their financial advisor, assisted them in navigating 'what's next' and overcoming obstacles, leading to greater recommendations.

And finally, the most important advantage of this course is… When you give purpose to others, you also discover meaning and purpose in your own life.

Here’s an example: I was a dentist for 32 years. In those 32 years, I came across 4 or 5 game-changing products or techniques that improved the patient care experience, but it also fueled my passion for dentistry. The Refocus Coaching Academy can offer you that same kind of motivation and enhancement to your career.

So, advisors… Get ready to be re-energized and increase your passion for financial planning. We'll equip you with the essential tools and training needed to guide your clients toward a more fulfilling life!