Appointment University Sponsored 15-Second Approach Training

One-Page Overview for Banks, Credit Unions & Wealth Partners

The Dual Opportunity

Most banks and credit unions face two gaps at the same time:

1. Front-line teams under-perform at starting conversations about the institution's own products (loans, mortgages, credit cards, etc.).
2. Referral flow into wealth management remains extremely low (often under 1% of households per year; credit-union investment penetration frequently around 2%).

The Scale of the Untapped Opportunity

• 56% of bank clients still have only traditional banking relationships — a conservative reading points to multi-trillion dollars in existing deposit relationships that remain unactivated for wealth services.

The 15-Second Approach

A simple, philosophical method that removes anxiety, inserts healthy doubt, and enables authentic conversations — with no scripts, no closing language, and no sales pressure.
When both the front-line team and the wealth advisors use the same approach, the entire conversation stays consistent and non-salesy.

Value for the Bank or Credit Union

- Stronger internal conversations and deeper everyday relationships.
- Cleaner, lower-pressure referral hand-offs when a wealth partner is involved.
- Reduced sales-practice risk (aligned with post-Wells Fargo expectations).
- No lead quotas — the training is simply an investment in better conversations.
- One training delivers two outcomes: internal growth + improved referral capability.

Value for the Wealth Partner

- A practical way to turn under-performing institutional relationships into working referral pathways.
- Access to warmer opportunities introduced by trusted staff inside a trusted institution.
- A lead-generation style investment (similar to other platforms wealth teams already fund) that carries the added strength of institutional and personal trust.

Result

A single, scalable training platform that improves the institution's own relationship growth while creating a natural, low-pressure bridge to wealth services. Both sides benefit.

Next Step

A short conversation to explore a simple pilot.