Coaching Program Overview – Trusted Advisor Mentor Program

Coach: Jeremy Nason, Co-Founder of Insurance Pro Shop™

Purpose of the Program

To help insurance agents and financial advisors master the skills, strategies, and mindset needed to consistently attract, engage, and close high-quality prospects — by becoming a true problem-solver and trusted advisor.

Coaching Structure

Format: 1-on-1 and small group coaching (virtual sessions)
Duration: Ongoing support with weekly or bi-weekly sessions
Style: Practical, results-driven, emotionally intelligent coaching

What We Work On

Each session is tailored to where the agent is in their business and skill development, but typically covers:

1. Mindset Shift: From Salesperson to Trusted Advisor

- Letting go of "pitching" and learning how to guide
- Overcoming fear, doubt, and sales resistance
- Building confidence through skill, not hype

2. Mastering the Conversation

- Proven probing and emotional questioning techniques
- How to uncover real needs, fears, and motivations
- Scripts and dialogues that feel natural and build trust

3. Attracting Ideal Prospects

- Clarifying your message and market
- Simple lead generation that fits your style
- How to stop chasing and start drawing prospects to you

4. Appointment Setting & Sales Flow

- What to say and when to say it
- Creating urgency without pressure
- Turning one appointment into multiple opportunities

5. Case Building & Solution Design

- Fact-finding that reveals the money
- Designing client-centered solutions — not product pushes
- Helping clients “see” and own the problem (before you offer a fix)

6. Follow-Up & Client Retention

- How to stay top of mind without being pushy
- Converting prospects who said 'not now'
- Turning clients into referral sources

Unique Coaching Benefits

• Real-world experience from someone who’s been in the trenches
• Tools and templates you can use right away
• Support between sessions via email or chat
• Accountability and encouragement to stay on track
• Access to IPS Resources for deeper learning

Who It’s For

• New agents who feel overwhelmed or stuck
• Struggling agents ready for a breakthrough
• Experienced advisors looking to refine and grow
• Anyone who wants to stop selling products and start building relationships

End Result

You’ll walk away with:
• A proven system that works
• Confidence in every conversation
• More appointments, better clients, and consistent sales
• The ability to build a business you’re proud of