



# THE Thrivers Program

**For Financial Advisers**

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Dr Adam Fraser in partnership with Deakin University (sponsored by AIA Australia) studied over 800 financial advisers in Australia to ask a simple question. What are the mindsets, behaviours and attitudes of advisers who are thriving despite the incredibly tough regulatory and business challenges that they are facing? Through the study of these high performing advisers they have effectively road mapped what advisers need to do to not only improve their wellbeing and work life balance, but also evolve their business to be more innovative and profitable.

Dr Fraser has taken all these learnings and created 'The Thrivers Program'. The program consists of four workshops, with support and behaviour change strategies undertaken in between. In previous programs this type of approach has been successfully implemented with school leaders, partners in professional services firms, finance executives and the pharmaceutical industry.

The purpose of the program is to help financial advisers to evolve the way they live and work.

## **SKILLS TAUGHT IN THE WORKSHOPS**

- 1. Adaptability** - this is the capacity to rapidly change your behaviour to suit quickly changing work situations.
- 2. Psychological Flexibility** - the ability to not let negative emotion and thoughts derail your behaviour, but instead be guided by your goals and values.
- 3. Psychological Capital** - the capacity to display hope, optimism, resilience and confidence in the face of challenge and struggle.
- 4. Wellbeing** - how to use recovery to prevent burn out and the accumulation of chronic stress.
- 5. Effective utilisation of resources** - how to leverage your time and resources to effectively manage the administration, compliance and operations load to free up time to focus on clients and business development.
- 6. Mental toughness and clear focus** - how to stay focused and think clearly when under pressure and stress.

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## THE OVERALL EXPERIENCE.

An important feature of any intervention is the experience people go through. It is not enough to just give people the content and expect them to embed it into their lives. Advisers will be supported and guided through the program.

**The design of the program includes the following characteristics to make it more successful:**

### A series of interactions

The program runs over a number of sessions, rather than giving participants a one-off workshop. Having a series of interactions helps embed behaviours and deepens knowledge.

### Behaviour change strategies

A key focus of the program is to help participants understand the latest breakthroughs in the psychology of behaviour change. Advisers will be supported to learn how they can alter their behaviours and habits, which is a skill in itself.

### Peer support

The program boosts people's level of connection and collaboration with other advisers. This not only builds support, but also fosters new ideas and innovation.

### Clear action plans and accountability

After each session the advisers will walk away with clear action plans to implement. They will also be held accountable for the implementation of these action plans. This is an essential part of the program.

### Buddy support

Each participant selects a buddy within the program. The buddy's role is to offer support and accountability through the program and beyond.

### Nudges

With the busyness of people's lives, the program uses environmental nudges to remind participants of the behaviours they are striving to implement.

## WHAT IS INCLUDED IN THE PROGRAM?

### Research pre and post program

Before the start of the program each participant works with a university researcher to understand their current state of wellbeing, balance and stress. We also measure where advisers spend their time at work, as well as how many and what type of interruptions they get in their day. Each participant receives an individual report covering all these measures. The research is performed again at the end of the program to determine what change has occurred.

### Four full day workshops

These workshops are spread across a 12-month period, with a 12 week gap in between sessions to allow participants to embed their actions from each workshop.

### Handouts and workshop materials

Participants will be provided with support materials, tangible takeaways and resources at each workshop to help remember and embed the lessons between sessions.

### Support and communication in between workshops

In between workshops, participants are supported in their action plans and reminded of the key principles covered in each workshop.

### Investment

\$2950 (+ GST) - Per Participant



*The Thriver's Program has been CPD accredited by the AFA.*

*This activity has been accredited for continuing professional development by the Financial Planning Association of Australia but does not constitute FPA's endorsement of the activity.*