

What did the client want to achieve?

- Scale practices, refine client acquisition, and reach elite status.
- Improve confidence, mental health, and overcome fear.
- Balance work and family priorities.
- Build consistent processes for time management, accountability, and growth.
- Achieve financial freedom and reduce stress for long-term lifestyle satisfaction.

The Approach

Southwestern Consulting coached Edward Jones financial advisors using a time-tested 150+ year model, which includes a 12-month, tailored “whole person” approach to Sales & Leadership Coaching.

Whereas Edward Jones’s internal coaching is primarily business-focused — emphasizing sales metrics and branch performance — SWC’s approach expanded further to include:

- **Business Performance:** Relationship building, intentional prospecting, including client asset mining, referral gathering, objection handling, client Goodknight language, AUM, and revenue growth.
- **Leadership Systems:** Delegation, equipping, empowering, accountability, public speaking, critical conversations, for both branch and region leadership.
- **Personal Well-Being:** Confidence, stress reduction, work-life balance, and health priorities.

By delivering holistic coaching, SWC helped Edward Jones advisors achieve measurable growth while also reinforcing the firm’s 2025 priority of Promoting Healthier Futures — supporting not just financial practices, but the overall well-being of colleagues.

The Results

**AUM
GROWTH**

89% of respondents reported AUM growth since coaching.

**REFERRALS &
PROSPECTING**

53% reported meaningful increases in activity.

**TIME
MANAGEMENT**

76% reported notable or significant improvements in time management skills and overall work life balance.

**LEADERSHIP
SYSTEMS**

74% improved their leadership systems for their branch and region.

CONFIDENCE

93% reported stronger confidence in business and life.

ROI

87% rated coaching ROI as a 4 or 5 on a 5-point scale.

“It’s the combination of proven strategies that lead to results, along with defining the human being I want to become in the process. I don’t have to sacrifice one for the other.”

-Edward Jones Advisor