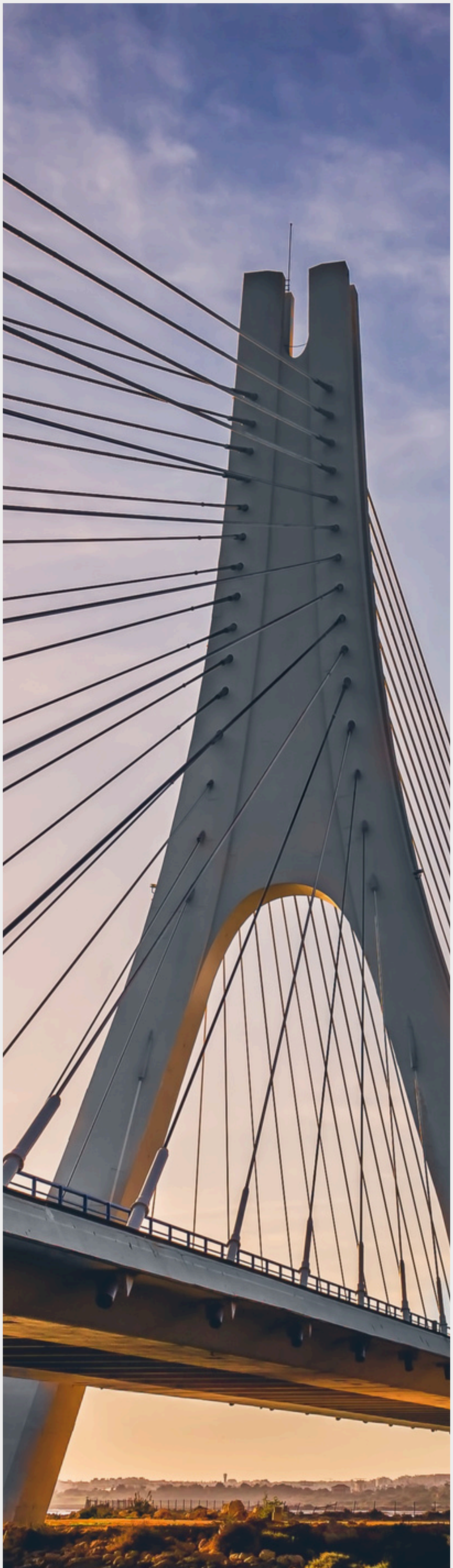
BEYOND INSURANCE

TRUSTED RISK ADVISOR™

Certification Program

Your Bridge to Deeper Trust, Stronger Relationships, & Better Outcomes



The Why

Become the Advisor People Trust.

Every professional reaches a moment when skill alone isn't enough. You know the products, the coverages, the carriers. But mastery comes when you begin to see risk differently — as a story to uncover, shape, and protect.

The Trusted Risk Advisor™ (TRA) program is built for that moment. It's not another course. It's a shift in how you think, communicate, and serve. You don't sell insurance; you lead people through uncertainty with clarity and confidence.

The certification is a symbol of professional excellence — recognizing mastery in consultative, diagnostic enterprise-level risk advisory skills. Delivered through four engaging sessions, online or in person, it equips you to listen deeper, diagnose faster, and deliver measurable value.

Average Net Promoter Score (NPS): 81 — proof that the process works.

The What

A System for Transformational Growth.

Behind every high-performing advisor is a system that builds trust. TRA gives you that framework — a five-step enterprise risk management process that helps you guide clients, strengthen underwriter relationships, and outpace the market.

You'll learn to:

- Turn discovery into strategy, not just data.
- Lead conversations that reveal unseen risks.
- Build credibility that makes price a secondary concern.
- Create consistency in results and relationships.

It's practical. It's human. It's built on the same process that enabled thought-leader Scott Addis to grow a $12 million book with a 95 percent hit ratio.

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Who Should Attend

Stand Out Intentionally.

- For the experienced professional who refuses to blend in.
- For those who value credibility over commodity.
- For leaders ready to turn knowledge into influence.

You must complete all four sessions in order to earn lifetime certification as a Trusted Risk Advisor™.

The Impact

Thinking...Growing...Transforming

Graduates leave with a new lens on risk and relationships. They create space for reflection, insight, and action. They become the professionals people seek out when the stakes are high.

This is not training to remember. It is a practice to live.

Take the Next Step.

Join the community of professionals redefining what it means to be trusted.

Contact: Carolyn Smith | csmith@beyondinsurance.com
Learn more at BeyondInsurance.com/TRA

Because trust isn't a credential you claim. It's a standard you earn — one conversation, one decision, one client at a time.

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FOUR SESSIONS. ONE TRANSFORMATION.

TRA 1: Sept. 14-29

Goodbye Agent & Broker. Hello Trusted Risk Advisor.

- Discover Your WHY...Your Purpose for Existence
- Your Path to Trusted Risk Advisor Status
- Differentiation, Commoditization, and the Traps
- Developing a Unique Message – Your TRA Value Proposition
- Risk, Risk Management, and the TRA Decision Matrix

Clarify your WHY and shape your unique value proposition.

TRA 2: Oct. 5-20

The Art and Science of Discovery... Leading to Strategy.

- The I^3 System
- The Five Stages in the Initial Prospect Interview
- Walk-Away Power
- The Employee Interview – Your Undercover Boss Strategy
- Case Study: Hospitality Industry
- The TRA Prospect Trigger – Emotion
- Active Listening
- The Prospect Qualification Filter

Use the I^3 System to connect issues, implications, and interventions.

TRA 3: Oct. 26-Nov. 10

The Risk Advisor – Moving Away from the Transactional Sale.

- How to Build a Strong Relationship with Your Underwriter
- The Art of Persuasion & Negotiation
- Tactical Empathy
- Prospect Research Evaluation Program (PREP)
- Filling the Prospect Pipeline
- The World of the CFO

Master negotiation, research, and executive-level conversation.

TRA 4: Nov. 16-Dec. 3

Creating a Differentiated Customer Experience Journey.

- The Customer Experience Journey
- Monitoring Risk and Risk Management within the TRA Framework
- Building Relationships that Last
- Creativity and Innovation — the One-Two Punch of the TRA
- The Art of Goal-Setting
- Living Each Day as a Servant Leader

Design experiences that build trust and loyalty that lasts.

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