

What our Participants say?



"Bernard Lim...is about **transformation**...he has been able to impart not only the 'whats' and the 'whys' but the 'hows' and with a heart. I resonate and endorse his passion for financial coaching and financial counselling because **in an age of (very) high tech, the ability to connect at a deep (and human) level is really the key value proposition**..."

Leong Sow Hoe ChFC® IBF Fellow
Senior Financial Services Director, Prudential Assurance
Past President IFPAS, AFinSA Board
Multi-Million Dollar Agency

"Bernard is a very passionate trainer and coach. He possesses the **wisdom, knowledge and practical experience** to help practitioners achieve their goals with their clients. I have **gained a lot from all the training and coaching!** Highly recommended!"

Joanne Lai CFP® AFCouns®
Senior Advisory Group Partner IPPFA
Top 10 FPAS Financial Planner Award 2018
MDRT 2015-2016 COT 2017, TOT 2018-2022



"The Financial Coaching Program has been **transformational** in the way I conduct my financial advisory business. With this training, I learned to become a **more effective finance coach to my clients and help them accelerate to greater heights in their financial journey.**"

Michelle Lee AFP™
Financial Adviser, Manulife Financial Adviser
Financial Adviser Of the Year 2021, Asia Advisors Network
COT 2021, 2022, Finance Influencer @askmichellelee

"I have attended every of his courses ever since 2011. He is definitely a trainer with a heart hence that resonate with me well because I only work with and learn from good people. His teaching is always **very practical, simple and easy to understand**, as well as to implement! He is a living example of **Doing Right, Doing Good & Doing Well!**"

Tea Eng Peng ChFC® CFEd® ASEP®
Financial Advisory Director, Financial Alliance Pte Ltd.
Top Director 2017 – 2021
6x MDRT qualifier, Produced 2 COTs & 7 MDRTs in 2022

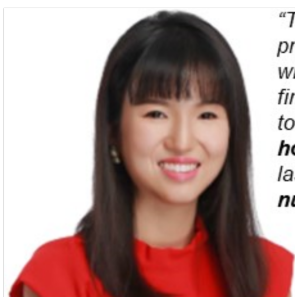


"Bernard possesses wisdom, knowledge, and practical experience to help practitioners achieve their goals with their clients. Through his teachings, I have a **strong foundation in financial coaching & counselling skills and can add better value add to my client.** If you want to be a professional financial planning practitioner, remember to **stay engaged and connected with him!**"

Eric Seah CFP® ChFC® ASEP®
Agency Leader, Prudential Assurance
Winner for Financial Planning Awards 2019
8x MDRT qualifier, COT 2022

"**Excellent tools and infrastructure** to help financial consultants to do right, do good & do well. **Clear, concise & engaging sessions** on what is **fundamental for growth** as a Financial Consultant. **Keep it up!**"

Kee Siew Poh CFP® ChFC®
Associate Director, Finexis Advisory Pte Ltd
Finalist of the FPAS
Financial Planner Award 2019-2020
COT 2008-2020, TOT 2021-2022



"The Program has **empowered me** with practical tools to **deepen my conversations** with my clients and **close the trust gap.** I find the 1-page financial blueprint very handy to kickstart a **client-centric** approach to **holistic planning**, which is vital in building lasting adviser-client relationships **beyond numbers and achieve win-win outcomes.**"

Regina Ong ChFC® CLU®
Senior Wealth Management Consultant, PIAS
MDRT 2022

"The Program is made up of very practical workshops that has **enlarged my services and enhanced the way I engage my prospect and customers.** The tools and the platform made available also help to reinforce the need for proper financial planning and facilitate immediate action. **Highly recommended!**"

Dennis Chua ChFC® AFWC®
Agency Leader, Prudential Assurance
SCI Appointed Trainer
Million Dollar Agency, MDRT 2022



"**Very practical, well structured, excellent course materials,** helpful case studies, lots of scripts and models we can plug and play right away, fresh way of looking at financial planning!"

Jonathan Khoo ChFC® ASEP® AFWC®
Director, Financial Alliance
8x MDRT producer

"**Very relevant** and applicable to be able to be **implemented immediately!**"

Fiona Foo ChFC® ASEP®
Executive Senior Financial Consultant
Great Eastern Financial Advisers
MDRT 2016-2020, COT 2021-2022

