



The Advisor PACT Monthly Session™

May 17, 2016

Hosted by Mark Little

How much benefit do you want from today's session?

**Are you ready to be here
and **no place else?****

- Max Dixon

This online meeting system technology uses lots of memory & system resources, so please...

- ✓ Close your **email** program
- ✓ Close all **browsers**
- ✓ Close **all programs** on your computer other than this GoToWebinar system

Consider taking this attitude starting right now:

Something discussed today will be a significant positive **game-changer** for my business
I want to focus so I don't miss it

ADVISOR
PROTECTION
ATTENTION
COORDINATION
TRANSparency



Issues Covered Today

- ✓ I'm interviewing a Financial Planning Subject Matter Expert, how do I make sure the person is a good financial planner?
- ✓ What are the client benefits of Truly Comprehensive Financial Services™?



Question

I'm interviewing a Financial Planning Subject Matter Expert,
how do I make sure the person is a good financial planner?

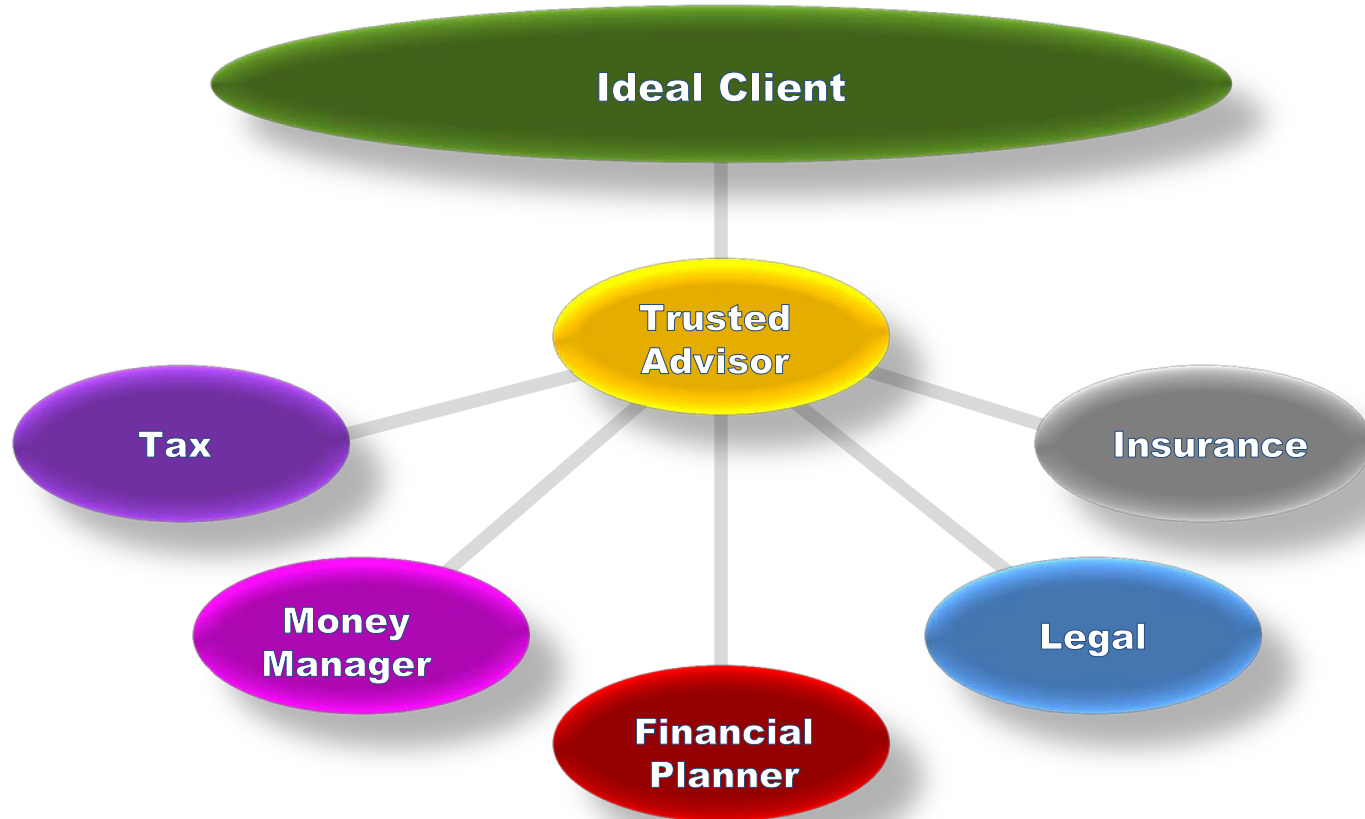
Traditional Financial Services Model

Critical Questions:

- ✓ Who establishes the overall **strategy**?
- ✓ Who provides **oversight** to ensure all recommendations are well-aligned with the overall strategy?
- ✓ Who's responsible for **measuring success** against the goals?



Our Business Model is In a “Category Of 1”



12-Step Process For Recruiting Subject Matter Experts



Identify
SME Role





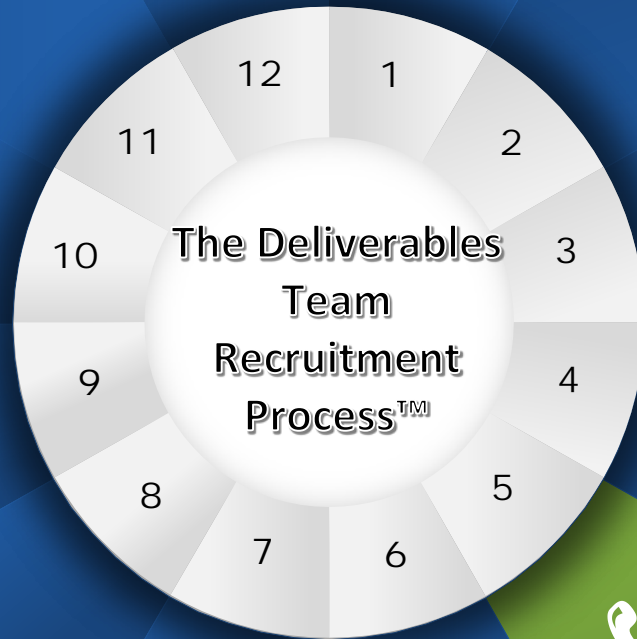
Create a
best in class
profile



Develop
Candidate
List



Initial Research



Research Call



Schedule
Meeting



The Initial
Discovery
Meeting™



The Best in Class
Assessment
Meeting™

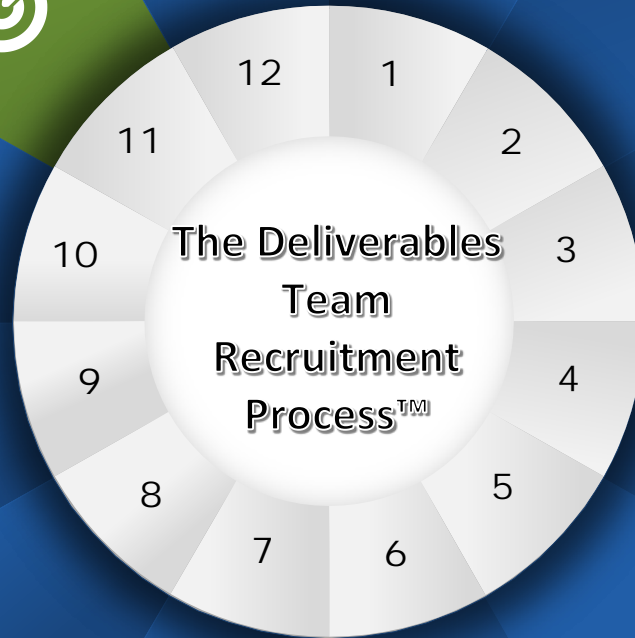
Internal
Agreement
Meeting



The
Deal Structure
Meeting™



Finalize
Agreement



Present
Agreement









The Best in Class Assessment Meeting™

- ✓ Meet your candidate's **team** & tour their business
- ✓ Confirm this candidate **commonly** works with clients who meet your Ideal Client Profile
- ✓ Document the candidate's **full process**
 - ✓ Candidate carefully walks you through **their** process
 - ✓ Document their **entire** process
 - ✓ Document **every single** client deliverable
 - ✓ Map-out the **first 12-month's** client-process
- ✓ Go back and **assess** this candidate's process and deliverables with your own team
 - ✓ Ensure this candidate's process is **more robust** than your Deliverables Checkpoints™
 - ✓ Will this SME **impress** Ideal Clients?
 - ✓ Will Ideal Client view your services as **indispensable**?





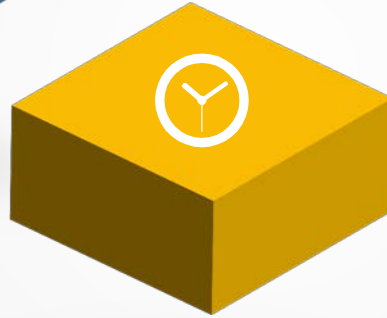
Question

What are the client benefits of Truly Comprehensive Financial Services™?

The 3 Client Outcomes



Remain On-track To Goals



Proactive on financial issues



Make better financial decisions

The 3 Client Outcomes



1

Remain On-track To Goals

Regularly measure success...
on-track or off-track.
Recommend regular course corrections

2

Proactive on financial issues

Never miss financial opportunities
No financial surprises

3

Make better financial decisions

Make smart choices about your money
along the way,
In all areas of finance

The 3 Client Outcomes



1

Remain On-track To Goals

- ✓ We'll Establish and maintain a **plan** for you to achieve your financial objectives by the target dates you set
(comprehensive written lifetime financial strategy)
- ✓ Measure progress benchmarked against your **goals** so that you know whether you're on-track or off-track at all times
- ✓ During times when your plan inevitably drifts off-course, we'll proactively recommend the **necessary course corrections** to get you back on-track
- ✓ We'll meet at least once every 4 months to confirm that you're **on-track** or, if you're off-track, to make specific recommendations regarding what you need to do to get back on-track

The 3 Client Outcomes



Proactive on financial issues

- ✓ Your plan will be so thorough, proactive, and far-sighted that you will...
 - ✓ Anticipate financial **opportunities** well in advance,
 - ✓ Avoid financial **surprises**
- ✓ We'll make sure you're **ahead** of financial issues, so you don't miss financial opportunities or get caught off-guard by predictable financial surprises.
- ✓ The goals of your long-term financial strategy are to...
 - ✓ Never to miss any financial opportunity to **accelerate** your results
 - ✓ No **Surprises**

The 3 Client Outcomes



Make better financial decisions

Make smart financial decisions in **all** areas of finance along the way

- ✓ Selecting the best method of making major **purchases**
- ✓ Whether to insure risks or “**self-insure**”
- ✓ Regularly shopping your “cash” and money market accounts for **the best short-term rates**.
- ✓ Creating **maturity strategies** for time-deposits
- ✓ Managing **health care** when travelling abroad
- ✓ Recommending which credit card **rewards** programs are best
- ✓ How to make the best decisions with **foreign currencies** when travelling or with large foreign purchases
- ✓ Best methods of managing **travel rewards** programs
- ✓ Creating a **crisis plan** for accessing finances during catastrophic events (crisis events or natural disasters)
- ✓ Etc, Etc, Etc...

The 3 Client Outcomes

Remain On-track To Goals

Always on-track to
your goals

Make better financial decisions

Make **smart choices**
about your money in
all areas along the
way



Proactive on financial issues

No **Surprises**

The 3 Client Outcomes

“This is what we do!”

Your annual compensation is to deliver **these 3** outcomes
(any other services are considered “beyond the scope”)

Remain On-track

To Goals

Your Ideal Client **must** value at least 1 of these 3 outcomes enough to pay your entire annual compensation

Always on-track to your goals

Your job is to inspire your team to continually deliver **more** value to clients **within** these 3 outcomes until your clients consider you **indispensable**.

Proactive on financial issues
No Surprises

Make better

As leader, it's your job to ensure your team is **continuing to stretch & grow** professionally within these 3 client outcomes until your referrals increase measurably.

Make better about your money in

Explain to your team that we'll know when we've arrived at the standard our **clients** expect when our Ideal Clients can't resist introducing us to others they know...

way

Until then we've got much **room for improvement** as a team