



The Advisor PACT **Monthly SessionTM**

December 1, 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**

Your
ADVISOR
PACT
Pledge

PROTECTION
ATTENTION
COORDINATION
TRANSPARENCY

To every Ideal Client

Question

I'm new to The Advisor P.A.C.T. Monthly Program™ and decided to go back and watch all the previous episodes of The Monthly Session™.

In one episode you describe Advisor PACT™ as a “paradigm shift.”

Could you elaborate & also share any & all other paradigm shifts involved in the Advisor PACT™ methodology?

I want to implement exactly, so are these paradigm shifts required?

Paradigm

[par-uh-dahym, -dim]

- ✓ a framework containing the basic assumptions, ways of thinking, and methodology that are commonly accepted by members of a scientific community.
- ✓ a cognitive framework shared by members of any discipline or group, such as, *“the company’s business paradigm.”*

Shift

[shift]

To put (something) aside and replace it, or exchange it, with something different.

Paradigm shifts within The Advisor PACT™ Methodology simply represent **acknowledgments of the reality of how successful affluent clients behave**

Reflects observations & data regarding what
affluent successful clients **want most** from
their relationship with a Financial Advisor
...and are will to **pay the most for**

Which are often **different** from the conventional thinking
inside the financial services industry

**Advisor PACT™
Paradigm Shifts**

```
graph TD; A[Advisor PACT™ Paradigm Shifts] --- B[What kind of business do you want? Do you want to be radically different from other advisors in the minds of clients?]; A --- C[Are you willing to invest time & effort required?]; A --- D[Are you willing to accept & focus primarily upon a Financial Advisor's highest priorities?]; A --- E[What's missing in the lives of most affluent potential clients?]; A --- F[How to measure success?];
```

What kind of business do you want?

Do you want to be radically different from other advisors in the minds of clients?

Are you willing to invest time & effort required?

Are you willing to accept & focus primarily upon a Financial Advisor's highest priorities?

What's missing in the lives of most affluent potential clients?

How to measure success?



The Ideal Advisor Profile for The Advisor P.A.C.T. Monthly Program™

This program is best suited for a financial advisor who,

- ✓ Likes the idea of doing a "whole lot more" for a "whole lot fewer" Ideal Clients who pay significantly higher compensation for the unprecedented level of services provided.
- ✓ Is committed to implementing Truly Comprehensive Financial Services™ at some point in the future, and as quickly as possible.
- ✓ Recognizes the wisdom of delivering Comprehensive Financial Services through a skilled team of Subject Matter Experts (Tax, financial planning, tax, estate planning, & insurance)... rather than serving as a one-man-band.
- ✓ Is willing to make the effort to implement this new business model to fill the gap in the marketplace created by financial advisors, and a financial services industry, unable or unwilling to provide Ideal Clients the Comprehensive Financial Services they desire.