

PROTECTION ATTENTION COORDINATION TRANSPARENCY

# The Advisor PACT Monthly Session™

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



### 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."

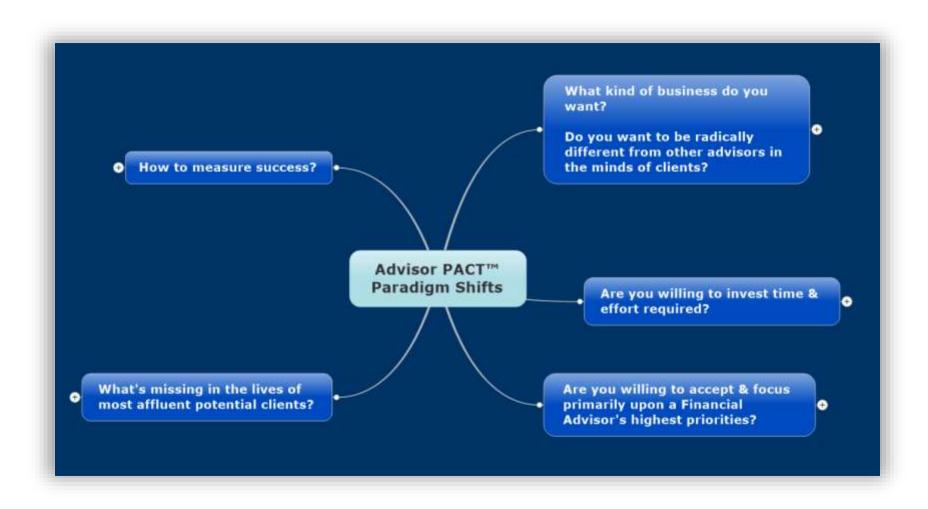
#### Shift

[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





#### 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<sup>™</sup> 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.