



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

February 21, 2017
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
Pledg

PROTECTION
ATTENTION
COORDINATION
TRANSPARENCY

To every Ideal Client

Question[?]

I've heard you describe Financial Advisors using The Advisor PACT™ method have clients paying \$50,000+ per year (annually recurring compensation to the advisor).

Can you help me get my mind around this, since there are two issues which are haunting me

1. There are not people in my area who want that level of service.
2. There are no people I can hire capable of delivering at that level of service in my area

Advisor Compensation

Per Client Per Year

\$100,000

\$25,000

\$20,000

USD

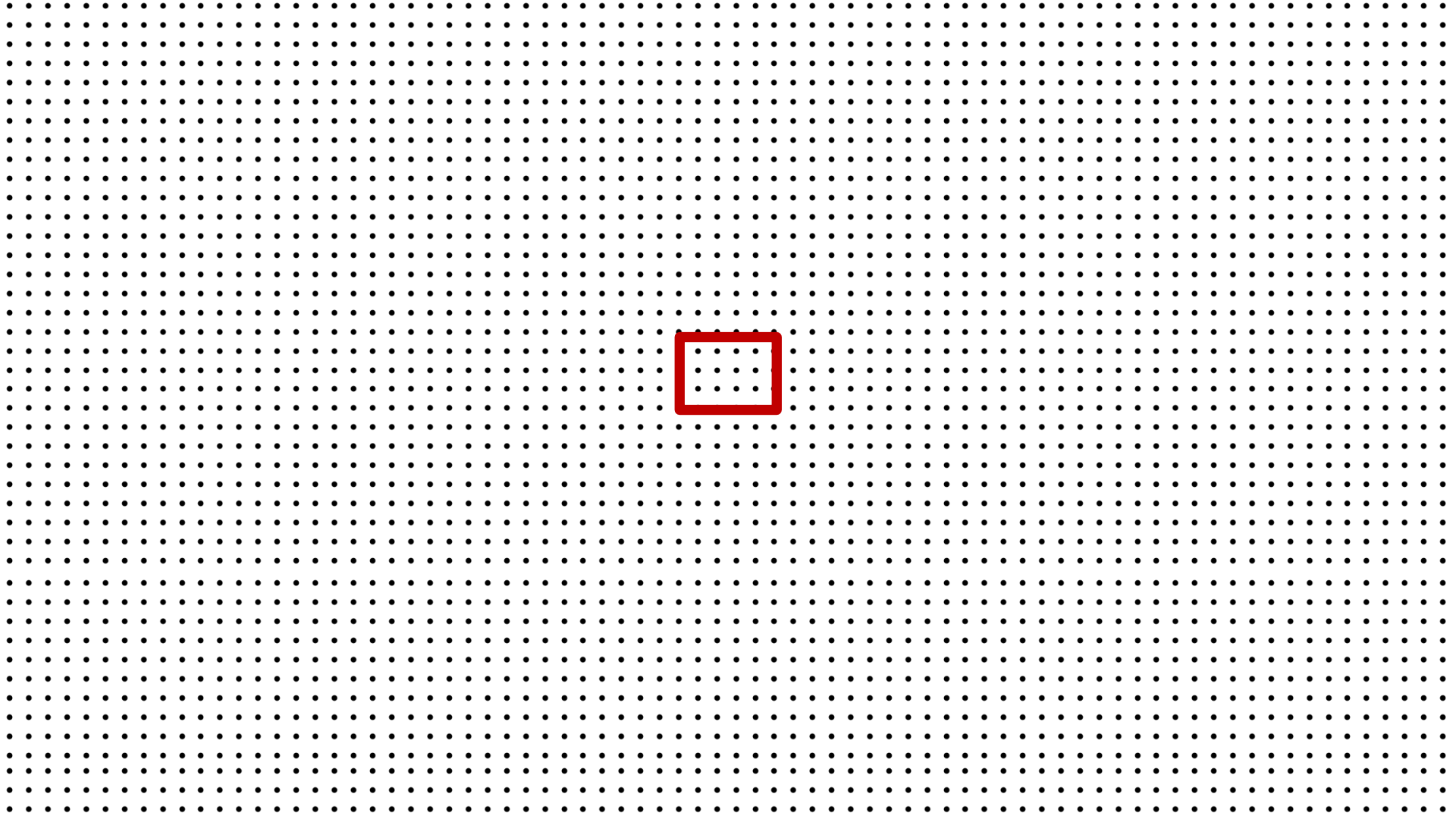


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The Advisor PACT™ Logic Path

1. There are not people in my area who **want** this level of service.
2. There are no people I can **hire** capable of delivering at that level of service in my area

The Advisor PACT™ Logic Path

People in my area don't want this level of service

Do you feel spontaneous unsolicited recommendations are rare, **or** are they routine, commonplace, to be expected routinely?

What if I could convince you that receiving voluntary impulsive client referrals is **common** (even primal) human behavior, and that failure to receive spontaneous unsolicited referrals is uncommon... even abnormal

What happens when a person's expectations are exceeded by an extremely wide margin?

Have you far exceeded a client's expectations (to the point they tell you that you're **indispensable** to them)?

There are no Deliverables Team Members capable of delivering this level of service in my area

What makes you think anyone other than you is responsible for ensuring an extraordinary client experience?

What if you actually stepped up & took 100% responsibility for ensuring an extraordinary client experience?

What if before you hired anyone, you confirmed they are highly skilled and excited about providing an extraordinary client experience (they're "on-board"... both willing & able) ?

What if a new team member's first 4-months is simply for you to evaluate in which areas that person enhances or detracts from the client experience?

Team members who demonstrate they can improve the client experience get to stay (the rest must quickly go away)

Do you agree that if a client is thoroughly impressed with you and your team, and their expectations are always exceeded, they will instinctively think of you when they become aware that anyone needs sound financial advice?

The Advisor PACT™ Logic Path

Would you agree that if you want to impress somebody (anybody) that the only way to do that is to have your standards exceed theirs?

Would you agree that the only way a client ever knows which standards you actually live up to is from the client experience they experience from you?

Would you agree that it's the client who's the one that's setting the standards for the client experience that you need to live up to?

Would you agree that the more successful & affluent the client, the higher their standards are for the client experience (the greater your challenge is)?

Would you acknowledge that the client experience you have provided is currently determining the number of referrals your clients are providing you (or are not providing you)?







**Having your calendar filled with
unsolicited referrals is the norm!**

**Not having a constant stream of
unsolicited referrals is abnormal...**

**...It's contrary to normal
human behavior**



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.