



PROTECTION ATTENTION COORDINATION TRANSPARENCY

# **The Advisor PACT** **Monthly Session<sup>TM</sup>**

January 23, 2018

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**

# The Trusted Advisor Toolkit™

## Fast Track

# Which Comes First?

- ✓ Acquire Ideal Clients
- ✓ Establish Team & Deliverables?



# The Trusted Advisor Toolkit™ is for Advisors who...

- ✓ Have several current client who are excellent candidates for your Ideal Client Community
- ✓ Are adding clients regularly at the highest end of current service level
- ✓ Currently have a strong Administrative Manager
- ✓ Fee for The Toolkit is comfortable (no strain)
  - ✓ \$1,000/month
  - ✓ 16 month minimum

The Trusted Advisor Toolkit™ is for Advisors who...

- ✓ Have more than one current client who are excellent candidates for The Ideal Client Community
  - ✓ Are adding clients regularly at the highest end of current service level
  - ✓ Currently have a strong Administrative Manager
  - ✓ Fee for The Toolkit is comfortable (no strain)
    - ✓ \$1,000/month
    - ✓ 16 month minimum
- Need a tool to organize  
client progress meetings  
& scale an already  
growing business**

## The Monthly Project™



### The Essential Concepts Of Advisor PACT

In this 9-part audio series, Mark McKenna Little and Ian F. Hood reveal a profoundly different perspective on 9 essential topics including: client acquisition, client retention, what clients really want from "The Client Experience" and how to align your business with what you and your clients really care about.

[Read more...](#)



### Vision and Goals | Make 2018 Your Best Year Ever!

Create a vision of your ideal future so compelling that you'll do whatever it takes to achieve your goals. Learn and develop disciplines to help you succeed in actualizing your vision.

[Read more...](#)



### Annual Recurring Revenue Exercise

Develop a specialized list of existing and potential clients that will guide you step-by-step through building your Ideal Client Community.

[Read more...](#)



### Potential Client Interaction Time

Learn why the most important number to track is the amount of time you spend interacting with potential clients, and begin tracking your PCI Time immediately.

[Read more...](#)



### The Role of the Administrative Manager

Your Administrative Manager is not an administrative support person—they are the Project Leader.

[Read more...](#)



## The Ten Client Deliverables, Course 1 of 2



### Setting Your Compensation

A new model for delivering financial services requires a new method of compensation. Learn how you'll get paid, and what you'll get paid to do under this new model.

[Read more...](#)



When you provide The Ten Client Deliverables to your clients, you are providing Truly Comprehensive Financial Services.

[Read more...](#)



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### The First 104 Days of a New Client Relationship

Learn how to get off on the right foot with every new Ideal Client relationship, and what you and your team should be doing during the first 104 days.

[Read more...](#)



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### The Hero's Journey

What do you have in common with Obi-Wan Kenobi? In this course, Mark walks you through how your path to becoming indispensable mirrors the classic Hero's Journey story structure.

[Read more...](#)



### The Extraordinary Client Experience

While the entire Advisor P.A.C.T.™ Monthly program is designed to help you deliver an extraordinary client experience, this module will dive into some simple ways you can start moving in that direction right away.

[Read more...](#)



### The Annual Referral Rate and Referrability Dashboard

By exceeding client expectations, you can increase the quantity and quality of referrals you receive.

[Read more...](#)



You may request modules **now** (out of sequence) if you have an immediate need.

Simply “**Contact Us**” and we’ll deliver  
the module you request  
in lieu of The Monthly Project™  
you would normally receive in sequence.

You are here: [Home](#) / [Welcome to Advisor PACT™ Monthly](#)

## Welcome to Advisor PACT™ Monthly

Congratulations—you've taken the first step towards delivering Truly Comprehensive Financial Services by joining the Advisor PACT™ Monthly program.

### First Steps

Before diving into your first module, we recommend reviewing some of the basics of the Advisor PACT philosophy that drives all of our courses and content. Block two hours on your calendar to watch the video below in its entirety, in which Mark walks through the 4 things that every client wants from a financial advisor, but can't find anywhere.



Once you're ready, go ahead and dive into your first month's module by clicking on "The Monthly Project™" from the top menu bar. You'll have access to each module for 30 days. After 30 days, you'll receive a new module, so be sure and block enough time on your calendar to get through each module in time.

[Register for The Monthly Session™](#) and submit your questions at least 2 business days in advance.

If you have any questions, click Contact Us in the top right corner of any page.

If ever you wish to quit the program, provide us notice at [rapidresponse@advisorPACT.com](mailto:rapidresponse@advisorPACT.com) at least 2 business days prior to your next scheduled payment to avoid being charged again. We will not issue any refunds. Upon cancellation the System Member's access will be revoked and the credit card on-file will not be charged the next regularly scheduled monthly charge.



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### Hiring an Extraordinary Administrative Manager

Master the ten steps to hiring an extraordinary Administrative Manager who will serve as the Project Leader for you and your team.

[Read more...](#)



### The Deliverables Team Recruitment Process

Acquire your next Deliverables Team member in 12 simple steps.

[Read more...](#)



### Evaluating Your Deliverables Team

Learn the process for evaluating each of your direct reports every 4 months in an effort to improve your client experience.

[Read more...](#)



### The Ten Client Deliverables, Course 1 of 2

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[Read more...](#)



### The Ten Client Deliverables, Course 2 of 2

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A word about “Contact Us”

# Which Comes First?

1. Acquire Ideal Clients First
2. Establish Team & Deliverables as you go



# Which Comes First?

1. Establish Team & Deliverables First
2. Then Acquire Ideal Clients



# Do You Need The Toolkit?

- ✓ Have some top-tier clients now
- ✓ Are adding clients at a regular pace
- ✓ Have a strong Administrative Manager in place



What is the overall  
process we're implementing in  
The Advisor P.A.C.T. Monthly Program™?

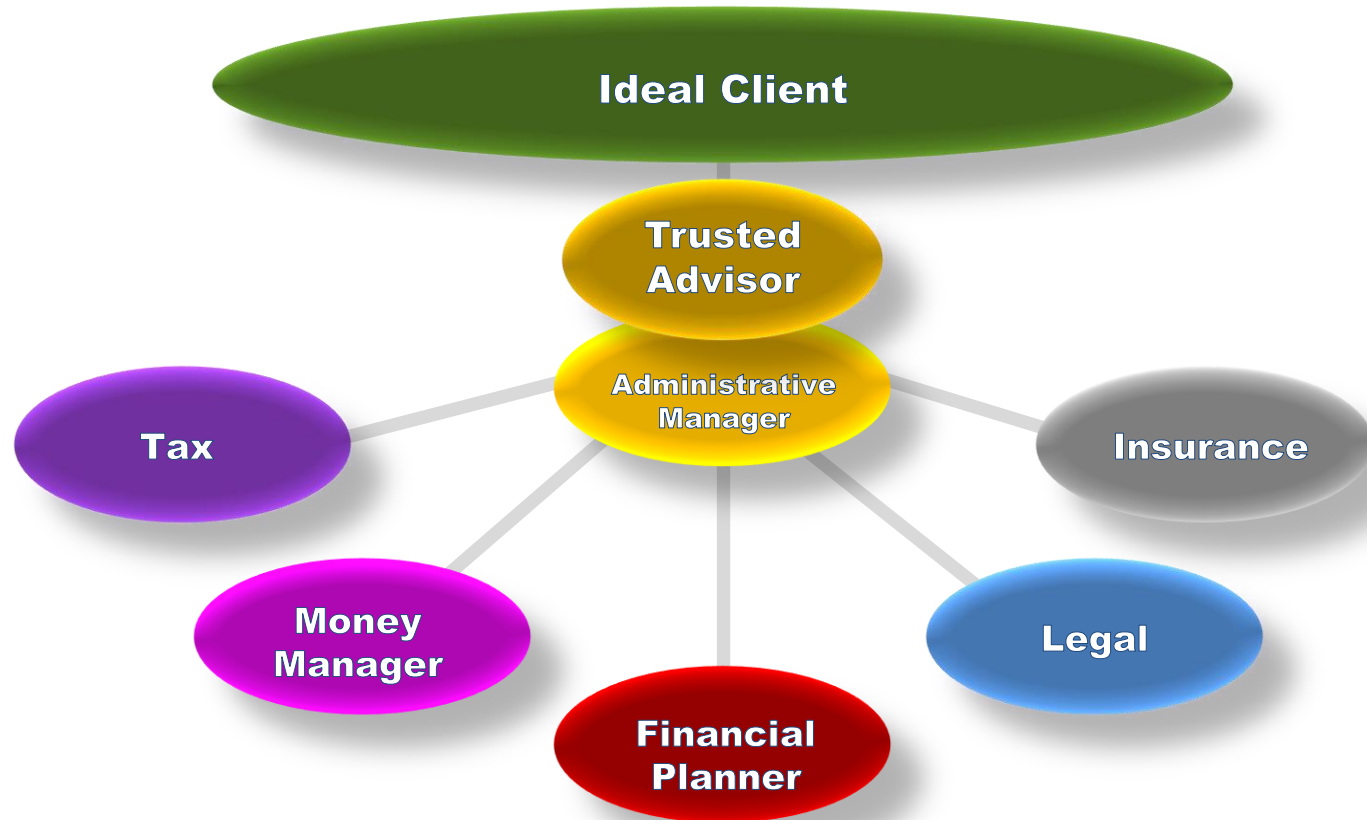


# The Referability Project™

- ✓ Establish clear goals for your ideal business (clarity of vision)
- ✓ Differentiate Yourself by breaking away from the pack (Advisor PACT™)
- ✓ Establish an “Ideal Client” service offering (different & better)
- ✓ Get Out Of The Office (Potential-Client Interaction Time)
- ✓ Acquire a Strong Administrative Manager (leader / semi-autonomous)
- ✓ Create an Extraordinary Client Experience (Compelling interactions)
- ✓ The Team Goal: Exceed Ideal Clients’ Expectations (entire team embraces)
- ✓ Measure Success: The Referability Dashboard™

What are  
The Ten Client Deliverables™?

# Our Deliverables Team Structure



# The Ten Client Deliverables™

1. Comprehensive written lifetime financial strategy (overarching plan)
2. The Greatest Probability Strategy™ (GPS) step-by-step implementation plan-of-action.
3. The Progress Reports™: Updated report for each of 5 SMEs... on track or off track
4. Deploy Assets: Asset, Investment, Money Management
5. Income Tax Projection Before The End of The Tax Year
6. Income Tax Review and On-time Filing
7. Estate Planning: Full review every 3-5 years
8. The Goal Blueprint™
9. The Master Goal Tracker™: Updated summary for each goal, including current status, available to every SME
10. Cash & Debt Management Plan

A Written Delivery Plan For Each of  
The Ten Client Deliverables™

## The Ten Client Deliverables™ (TCD)



Deliverable	Delivery Plan	Who
<p><b><u>1. Written Lifetime Financial Strategy:</u></b>  Comprehensive written lifetime financial strategy (Initially finalized prior to day 104 after The Initial Client Interview™, Subsequently updated annual for DRPM prior to TAR)</p> <p><b>New Client Back Office Activities</b></p> <ol style="list-style-type: none"> <li>The Initial Client Interview™ <ul style="list-style-type: none"> <li>✓ You establish and share your values &amp; future financial goals</li> <li>✓ We assess your current financial reality as a benchmark to measure where you are now as compared to where you want to be financially</li> <li>✓ We receive <i>all</i> your financial information &amp; all financial documents</li> </ul> </li> <li>Each of our Subject Matter Experts deploy their individual professional processes, under the lead of our Financial Planning Subject Matter Expert, and begin “the process” with study &amp; analysis; the outcome of which is a draft lifetime financial strategy (by day 59) <ul style="list-style-type: none"> <li>✓ Financial Planning Subject Matter Expert (Lead)</li> <li>✓ Tax Planning Subject Matter Expert</li> <li>✓ Money Management Subject Matter Expert</li> <li>✓ Estate Planning Subject Matter Expert</li> <li>✓ Insurance Subject Matter Expert</li> </ul> </li> <li>The Initial Progress Update™ (day 59 after The Initial Client Interview™): A draft strategy is agreed upon by our team... with recommendations shared with you.</li> <li>The Initial Comprehensive Safety Review™: <ul style="list-style-type: none"> <li>✓ Your comprehensive written lifetime financial strategy is now completed with all action items shared with you on The Greatest Probability Strategy™ (GPS) step-by-step implementation plan-of-action document.</li> <li>✓ The conversation is now focused upon increasing the safety of your comprehensive lifetime strategy</li> </ul> </li> </ol>	<ul style="list-style-type: none"> <li>• Involves input, analysis &amp; recommendations from every one of our Subject Matter Experts, led by our Financial Planning Subject Matter Expert (who collaborates with each Subject Matter Expert and coordinates the establishment of your over-arching financial strategy)</li> <li>• Initially completed on or before day 104 after The Initial Client Interview™ (Prior to The Initial Comprehensive Safety Review™), with a “draft lifetime strategy” completed no later than day 59 after The Initial Client Interview™</li> <li>• Updated Annually for the DRPM prior to The Annual Review™</li> <li>• I will conduct the Correct Your Aim™ (CYA) client exercise at The Annual Review™ each year to identify all course-corrections necessary for you to remain on-track</li> </ul>	Financial Planning Subject Matter Expert (FP)

## The Ten Client Deliverables™ (TCD)

Deliverable	Delivery Plan	Who
<p><b><u>2. The Greatest Probability Strategy™ step-by-step implementation plan-of-action: Your GPS</u></b> (Updated for DRPM prior to every CSR, GPO, TAR)</p> <ul style="list-style-type: none"> <li>A step-by-step plan of action describing every action item envisioned by our Best-in-Class (BIC) Deliverables Team (DT) of Subject Matter Experts (SMEs) resulting from the comprehensive lifetime written financial plan.</li> <li>A simple chronological list of action steps required to create the greatest probability that you will stay on-track with your financial plan over the years.</li> <li>The Greatest Probability Strategy™ (GPS) is a repository of every action item and recommendation for you from every Subject Matter Expert on our combined Deliverables Team. Every recommendation for the remainder of your life is documented here. For clarity, if a recommendation is not on The Greatest Probability Strategy™ (GPS), we didn't endorse it.</li> </ul>	<ul style="list-style-type: none"> <li>Every Ideal Client agrees to three progress meetings per year (The Three Meeting Process™).</li> <li>Your GPS is updated by our Subject Matter Experts prior to the client progress meeting every four months.</li> <li>1. Every one of our Subject Matter Experts contributes to your Greatest Probability Strategy™ (GPS)</li> <li>2. Every Subject Matter Expert collaborates with the others in-between every client progress meeting</li> <li>3. Every Subject Matter Expert reviews the work of the others prior to every Dry-Run Prep Meeting™</li> </ul>	Financial Planning Subject Matter Expert (FP)

## The Ten Client Deliverables™ (TCD)

Deliverable	Delivery Plan	Who
<p><b><u>3. The Progress Reports™</u></b> (Updated for DRPM prior to every CSR, GPO, TAR) Delivery of simple progress reports to you. Mostly one-pagers, these simple summaries of your assets are designed to show you the progress you are making benchmarked against the goals you have set for yourself.</p> <p>The Progress Reports™ are summary reports collecting only the most pertinent information into easy-to-consume reports clearly reporting the progress you've made towards the financial objectives you've set.</p> <p>Unlike reports typically generated by the financial services industry, we have plucked only the most relevant information in each area of personal finance and created simple summary reports, in every key area of personal finance, designed to give all the information you will need to make big decisions, omitting everything else. In addition to The Progress Reports™ you will receive a summary report in each of your areas of personal finance:</p> <p><b>The Five Critical Reports™...</b></p> <ol style="list-style-type: none"> <li>1. <b>Money Management:</b> The Circle Chart™</li> <li>2. <b>Tax:</b> The Annual Tax Projection</li> <li>3. <b>Insurance:</b> The Insurance Grid™</li> <li>4. <b>Estate:</b> The Legacy Flow™</li> <li>5. <b>Financial Planning:</b> The Greatest Probability Strategy™ (GPS) step-by-step implementation plan-of-action.</li> </ol>	<ul style="list-style-type: none"> <li>Simple progress reports generated prior to each DRPM (3x per year) including:</li> </ul> <p><b>The Progress Reports</b></p> <ul style="list-style-type: none"> <li>✓ The Goal Progress Report™</li> <li>✓ The Progress Since Inception Report™,</li> <li>✓ The Progress Since Last Meeting Report™</li> </ul> <ul style="list-style-type: none"> <li><b>The Five Critical Reports™</b> are prepared, prior to every DRPM, by the SME assigned to each area of personal finance</li> </ul>	Financial Planning Subject Matter Expert (FP)

## The Ten Client Deliverables™ (TCD)

Deliverable	Delivery Plan	Who
<p><b><u>4. Asset, Investment, and Money Management</u></b> (On-going, Updated for DRPM prior to every CSR, GPO, TAR) Oversight is provided over all managers of your growth/goal assets to ensure:</p> <ul style="list-style-type: none"> <li>Your overall allocation is suitable.</li> <li>The lowest cost, highest quality growth assets are reviewed for suitability.</li> <li>Performance is serving your long term goals.</li> <li>A comprehensive due diligence checklist is performed to ensure safety of your assets is performed annually.</li> </ul> <p>• <b>General Planning</b></p> <ul style="list-style-type: none"> <li>In-depth issues are reviewed with you to ensure any changes in your circumstances are envisioned by your comprehensive written lifetime financial strategy.</li> </ul> <p>• <b>Money Management Subject Matter Expert</b></p> <ul style="list-style-type: none"> <li>The term “<i>money management</i>” refers to the management of financial assets such as company stock, bonds, and mutual funds</li> <li>The term “<i>asset management</i>” refers to the management of other classes of assets such as real estate, royalties, commodities and other business interests.</li> <li>Our Money Management Subject Matter Expert coordinates both efforts to ensure             <ol style="list-style-type: none"> <li>All management efforts are well-coordinated &amp; aligned with your comprehensive written lifetime financial strategy.</li> <li>Encourage, insist and enforce all managers continually improve the quality &amp; quantity of necessary communications with complementary Subject Matter Experts</li> </ol> </li> </ul>	<ul style="list-style-type: none"> <li>Asset, investment, &amp; Money Management is ongoing, with progress measured at your client progress meeting every four months.</li> <li>A thorough due diligence process, designed to ensure the safety of your money, is performed annually prior to your Goal Progress Outlook™ (GPO) progress meeting.</li> <li>Our team will fully coordinate the four areas of Money Management:             <ul style="list-style-type: none"> <li>✓ Asset Allocation</li> <li>✓ Overall Portfolio Management</li> <li>✓ Individual account/asset managers</li> <li>✓ Daily Management</li> </ul> </li> <li>The Circle Chart™ is updated by our Money Management Subject Matter Expert prior to every DRPM</li> </ul>	Money Mgmt Subject Matter Expert

## The Ten Client Deliverables™ (TCD)

Deliverable	Delivery Plan	Who
<p><b><u>5. Income Tax Projection Before The End of The Tax Year</u></b> (Updated for DRPM prior to the end of the tax year; EOY)</p> <p>Prior to the End of Year (EOY, meaning “tax year”) will do serious income tax planning for you with two objectives in Mind:</p> <ul style="list-style-type: none"> <li>Seek ways to reduce taxes, and...</li> <li>Make sure there’s no surprises come next April.</li> </ul>	<ul style="list-style-type: none"> <li>Target: Four months before the end of the “tax year,” while actions may still be initiated affecting the current “tax year”</li> <li>A “Tax Projection” Report is generated</li> </ul>	Tax Subject Matter Expert
<p><b><u>6. Income Tax Review and On-time Filing</u></b> (For DRPM prior to the Tax Filing (lodging) Deadline) Our Tax Subject Matter Expert (SME) will review your tax return each year before it is submitted with the dual objectives of</p> <ul style="list-style-type: none"> <li>Ensuring there were no opportunities overlooked.</li> <li>Ensuring there are no “red flags” to the government.</li> <li>A tax review document is generated describing everything below along with advice, guidance for each item:             <ul style="list-style-type: none"> <li>Tax reduction opportunities present</li> <li>Tax reduction opportunities underutilized or “to watch”</li> <li>List of potential tax “red flags” present</li> </ul> </li> </ul> <p>Overall opinion &amp; summary of your overall tax situation clearly stating whether your tax strategies &amp; tactics are “ahead of the game,” or “needs further improvement”</p>	<ul style="list-style-type: none"> <li>Target: all tax returns are to be completed and filed before the deadline</li> </ul>	Tax Subject Matter Expert





## The Ten Client Deliverables™ (TCD)

Deliverable	Delivery Plan	Who
<p><b>7. Estate Planning:</b> (The Legacy Flow™ updated for DRPM prior to every GPO, with a full estate review once every 3-5 years, and “as required”)</p> <ul style="list-style-type: none"> <li>• <b>The Legacy Flow™:</b> We will ensure that you review a summary of your estate plan annually to determine if...           <ul style="list-style-type: none"> <li>▪ Your estate circumstances have changed.</li> <li>▪ Your desires about your estate have changed.</li> <li>▪ The estate tax laws have significantly changed.</li> </ul> </li> <li>• <b>Full-review of your Estate Plan:</b> Once every 3-5 years, as determined by our Estate Planning Subject Matter Expert, we will ensure you have an Estate Planning Attorney review your estate plan (your wills &amp; trusts) with the objective of:           <ul style="list-style-type: none"> <li>▪ Ensure there is a solid plan, aligned with your wishes, for the management of your affairs if, even temporarily, you are unable to make decisions.</li> <li>▪ Establishing a plan for your money to make it into the next generation and to survive beyond that, and...</li> <li>▪ Create a structure that will bring your heirs closer together, rather than animosity and conflicts about the money after you're gone.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• We will ensure you have your estate plan reviewed by an estate planning attorney within the first 12-months of our relationship.</li> <li>• You will review your estate plan annually at our The Goal Progress Outlook™ (GPO) client progress meeting.</li> <li>• Estate documents fully reviewed routinely at least once every five years.</li> </ul>	Estate Planning Subject Matter Expert

## The Ten Client Deliverables™ (TCD)

Deliverable	Delivery Plan	Who
<p><b>8. The Goal Blueprint™ Updated Annually</b> (Prior to the GPO) The Goal Blueprint™ (TGB) is prepared <b>annually</b> for each one of your goals prior to every GPO; this is a 1-pager describing the strategies and tactics recommended to achieve each client goal.</p> <p>The Master Goal Tracker™ is an online summary, and status report, of The Goal Blueprint™ which is updated prior <b>to every</b> Dry-Run Prep Meeting™. The Master Goal Tracker™ is available to every one of the Oversight Subject Matter Experts assigned to you.</p> <p><b>Back office Activities:</b></p> <ul style="list-style-type: none"> <li>• <b>The Goal Blueprint™</b> is an <b>annual update</b>, for every Ideal Client, of...           <ul style="list-style-type: none"> <li>▪ Lifetime capital projections.</li> <li>▪ 1-pager for every goal requiring money and planning to achieve (The Goal Blueprint™)               <ol style="list-style-type: none"> <li>1. Phase I Goal Funding Strategies &amp; Tactics displayed</li> <li>2. Phase II Goal Distribution Strategies &amp; Tactics (“decumulation phase) displayed</li> </ol> </li> </ul> </li> <li>• <b>The Master Goal Tracker™</b> (online summary of The Goal Blueprint™ available to every Subject Matter Expert assigned to an Ideal Client) is updated <b>prior to every</b> DRPM:           <ul style="list-style-type: none"> <li>▪ Summary of The Goal Blueprint™ is updated once every 12 months, prior DRPM for the GPO</li> <li>▪ Status update for every client goal: two pieces of data on The Master Goal Tracker™ are updated prior to every DRPM...               <ol style="list-style-type: none"> <li>1. <b>Status of the goal:</b> On-track, off-track, etc</li> <li>2. <b>Current Amount:</b> The amount a client currently has earmarked for the eventual funding of a goal</li> </ol> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• The Goal Blueprint™ for every goal you share with us will be fully updated every year at The Goal Progress Outlook™ client progress meeting (GPO)</li> <li>• A written plan for each of your goals, updated internally whenever your circumstances change (at least annually).</li> </ul>	Financial Planning Subject Matter Expert

## The Ten Client Deliverables™ (TCD)

Deliverable	Delivery Plan	Who
<p><b><u>9. Cash Reserves and Debt Management:</u></b> (Updated for DRPM prior to TAR)</p> <ul style="list-style-type: none"> <li>• We will recommend and work with you to establish an adequate cash reserves to handle financial issues that come up in life.</li> <li>• This involves establishing a debt elimination plan.</li> <li>• Buying or refinancing a house or any other major purchase would trigger additional help from us.</li> </ul>	<ul style="list-style-type: none"> <li>• Recommendation for funding and maintaining your cash reserves will be reviewed and discussed at your progress meetings every four months.</li> <li>• “Par levels” of “cash” for every financial asset account is established regularly, as needed (at least annually)</li> <li>• Your detailed written Cash Reserves and Debt Management plans will be updated (at least annually) as a part of you’re the Annual Review™ meeting.</li> </ul>	Financial Planning Subject Matter Expert
<p><b><u>10. The Comprehensive Safety Review Exercise™</u></b> (Updated for DRPM prior to every CSR)</p> <ul style="list-style-type: none"> <li>○ First, you, along with our entire team, identify every conceivable risk to your comprehensive written lifetime financial strategy</li> <li>○ Second, we create a sensible strategy to address each one and embed it within your comprehensive written lifetime financial strategy</li> </ul> <p>Also, as a part of The Comprehensive Safety Review™ our team will review every kind of insurance annually and</p> <ol style="list-style-type: none"> <li>1. Recommend the right kinds &amp; amounts of insurance,</li> <li>2. Be sure there are no “coverage gaps” which might endanger the financial plan, and</li> <li>3. Explore what, if anything, can be done to reduce premiums.</li> </ol>	<ul style="list-style-type: none"> <li>• The Comprehensive Safety Review™ client progress meeting annually</li> <li>• An Insurance Fact-Finder will be provided requesting information back from you prior to The Comprehensive Safety Review™ (CSR) progress meeting each year.</li> </ul>	Insurance Subject Matter Experts

# The Ten Client Deliverables™

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10. Cash & Debt Management Plan



## **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.