



PROTECTION ATTENTION COORDINATION TRANSPARENCY

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

February 20, 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**

A Financial Advisor  
who's *seriously* implementing  
this system...

...Has lots of questions for us!

(which we encourage, welcome, and enjoy)



**I'm building my team  
(Now have 2 Subject Matter Experts),  
but just encountered a potential client  
who doesn't want to use one of my SMEs  
(my Tax SME).**

**He thinks I'll discount my fees as a result.  
How would you handle this situation?**

To answer that question, lets look at...

*The Traditional Financial Services Model*

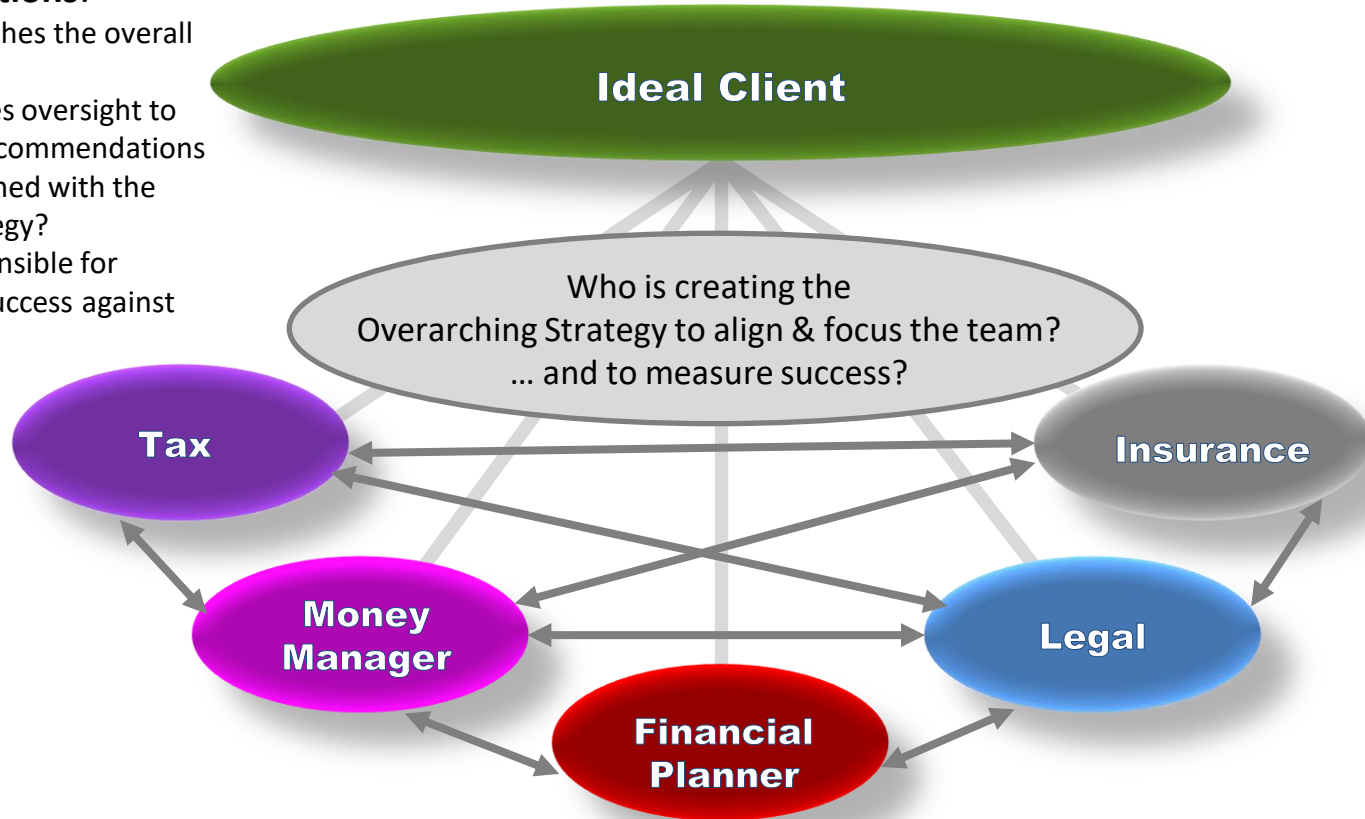
-versus-

*The Advisor PACT™ Team Structure*

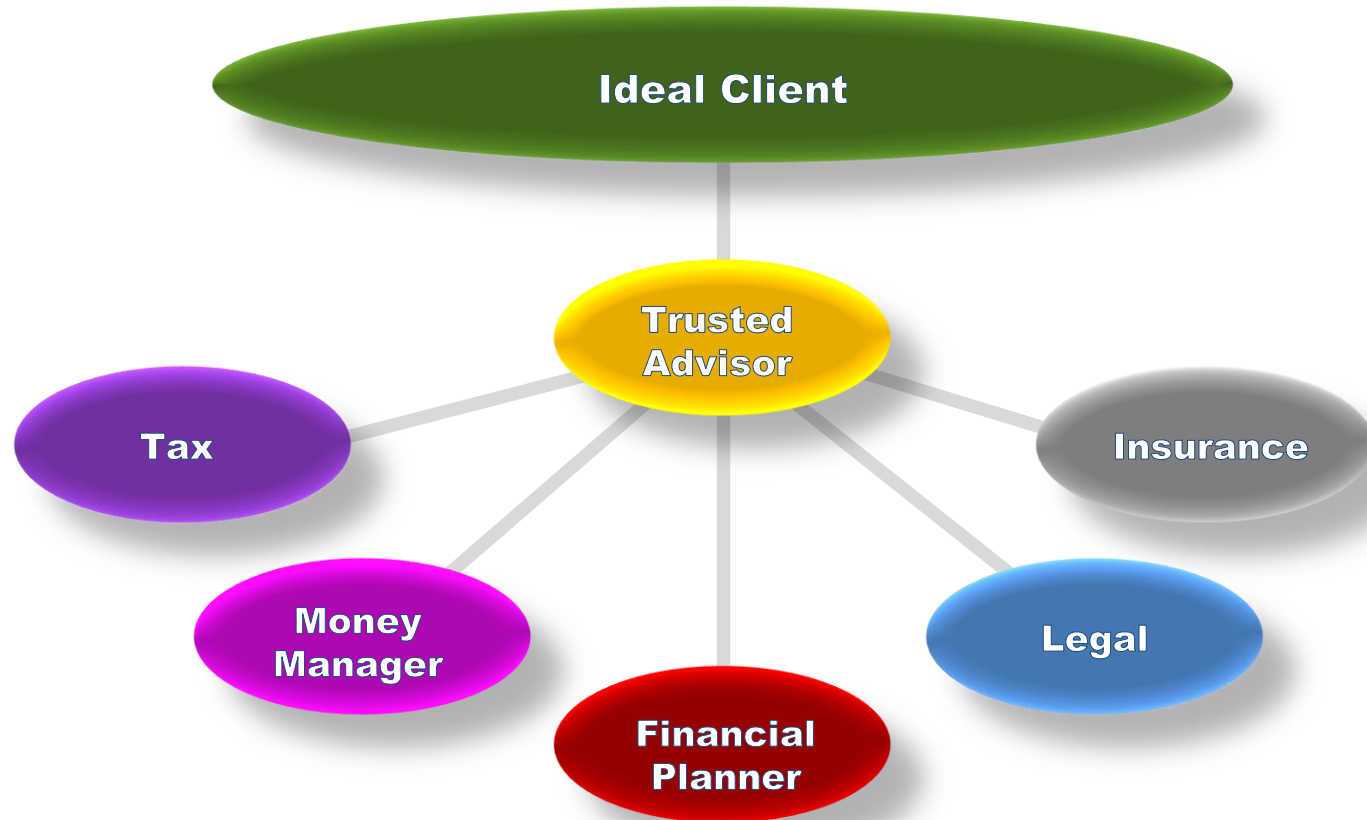
# Traditional Financial Services Model

## 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?

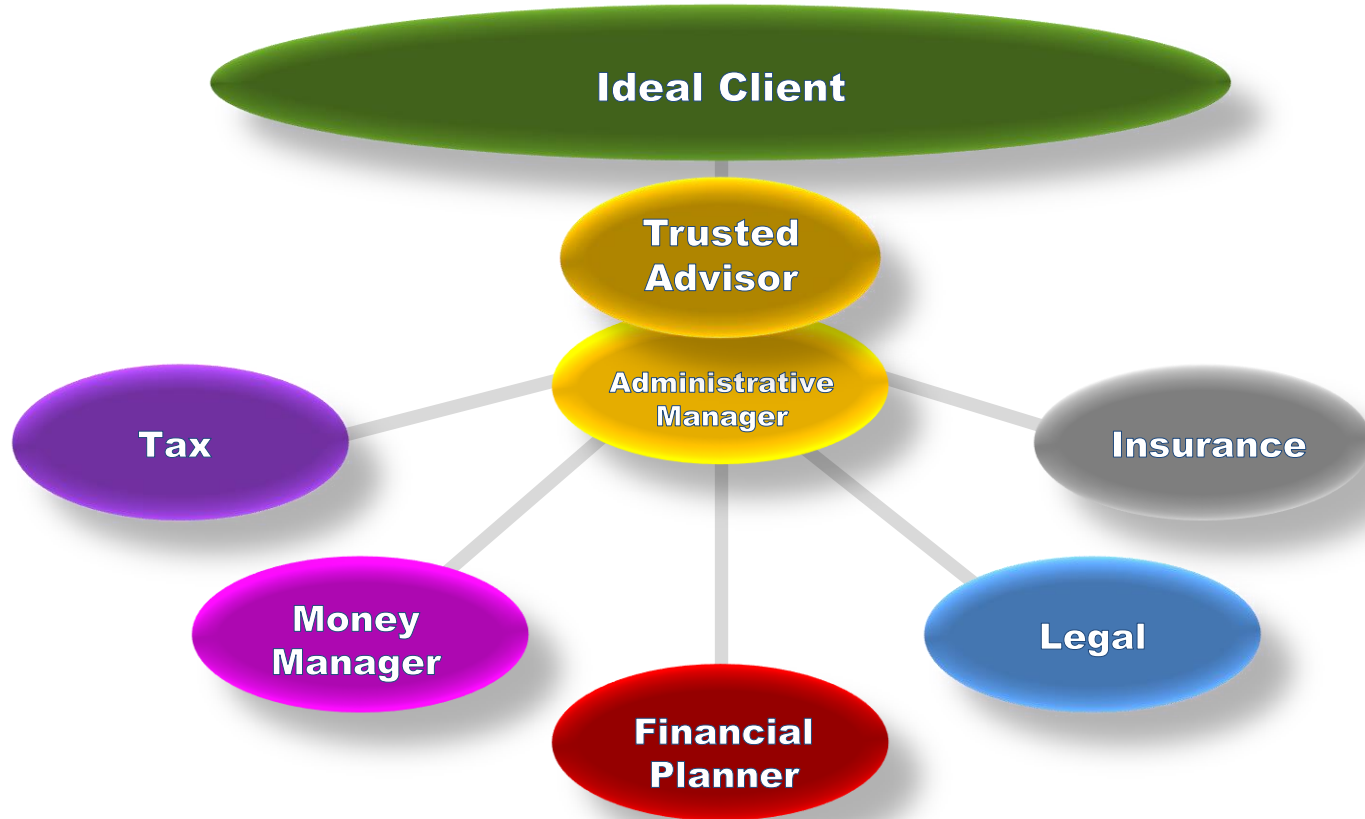


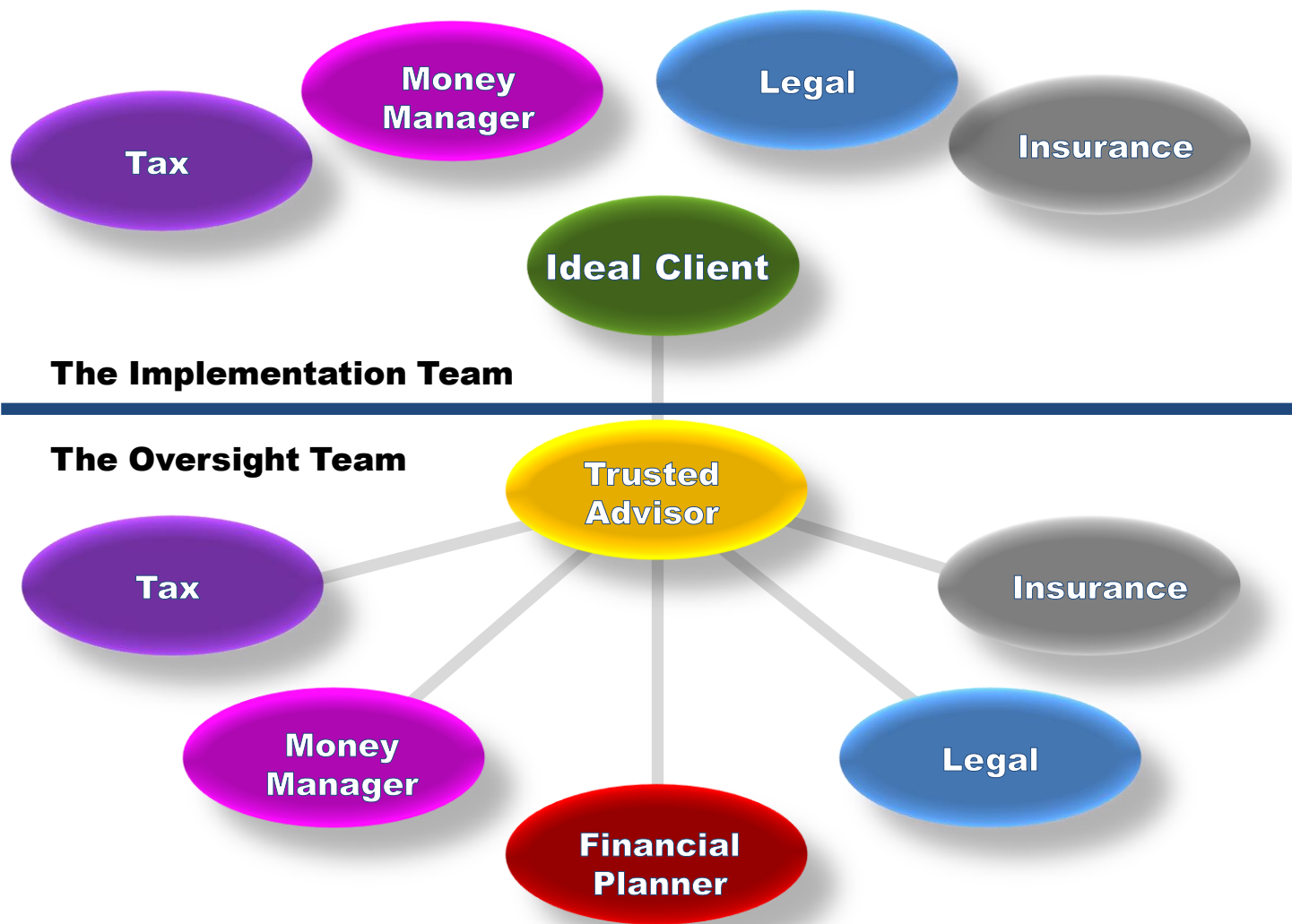
# Our Deliverables Team Structure





# Our Deliverables Team Structure





***Ideal Client:*** “But I don’t want to use ***your*** CPA, I want to continue using my guy!  
The tax accountant I like, and have been using for the past 20 years.

***Trusted Advisor:*** That’s no problem. I’d love for you to continue working with your CPA, as long as they’re capable and up-to-the-task.

The reason I have a Tax Planning Subject Matter Expert on our team is because there are usually large gaps that have not been happening before our arrival...  
... which we need to fill before your team will function properly.

To confirm that may I ask you 3 questions about your CPA?

1. How often has your CPA ever created an overarching strategy, against which you can measure whether or not you’re on-track to your goals at any given time?
2. In the past, when your CPA made recommendations, how did he know whether his recommendations were well-aligned with your overall strategy?
3. How often does your CPA let you know that you’re either on-track for all your goals, or that you’ve drifted off-track and provided you specific recommendations required to get back on-track?
  - ✓ Great... let’s pull them out & look at them!

Your CPA is a skilled Tactician who is *not* a strategist.  
Our Tax Planning Subject Matter Expert *is a Strategist*  
(skilled at overseeing tacticians).

Our Tax Planning Subject Matter Expert will coordinate with your CPA to perform the 2 critical functions that have been *missing* in your financial life...

Strategy  
Oversight

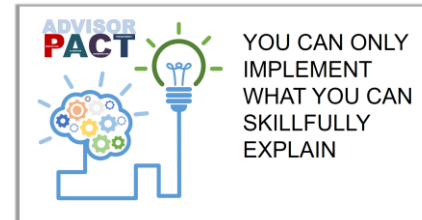


**I've never had "team members" before.  
Now that I have an Administrative  
Manager & 1 Subject Matter Expert,  
they're asking me questions and  
wondered how you would respond.  
One question is, "what led me to want to  
implement the Advisor PACT™ method?"  
How would you respond?**



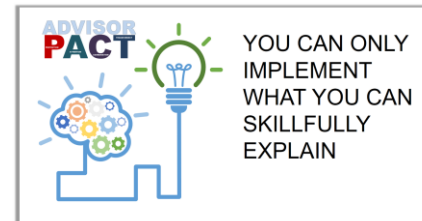
YOU CAN ONLY  
IMPLEMENT  
WHAT YOU CAN  
SKILLFULLY  
EXPLAIN

If a Trusted Advisor became skilled  
at explaining just  
**4** important concepts,  
...it would be these four.



# The 4 Most Important Leadership Conversations

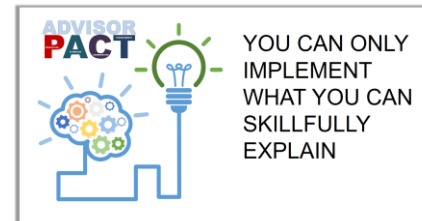
1. Here's why our team structure is superior
2. Everyone on our team contributes to  
The Team Goal
3. The Initial Team Exercises For Improving  
The Client Experience
4. The 17 Items Required During an SME's  
First 30-Days On The Team





# The 4 Most Important Leadership Conversations

1. Here's why our team structure is superior
2. Everyone on our team contributes to  
The Team Goal
3. The Initial Team Exercises For Improving  
The Client Experience
4. The 17 Items Required During an SME's  
First 30-Days On The Team





## **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.