



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

April 17, 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
TRANSPARENCY
PROTECTION
ATTENTION
COORDINATION
Pledge

To every Ideal Client

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

...Has lots of questions for us!

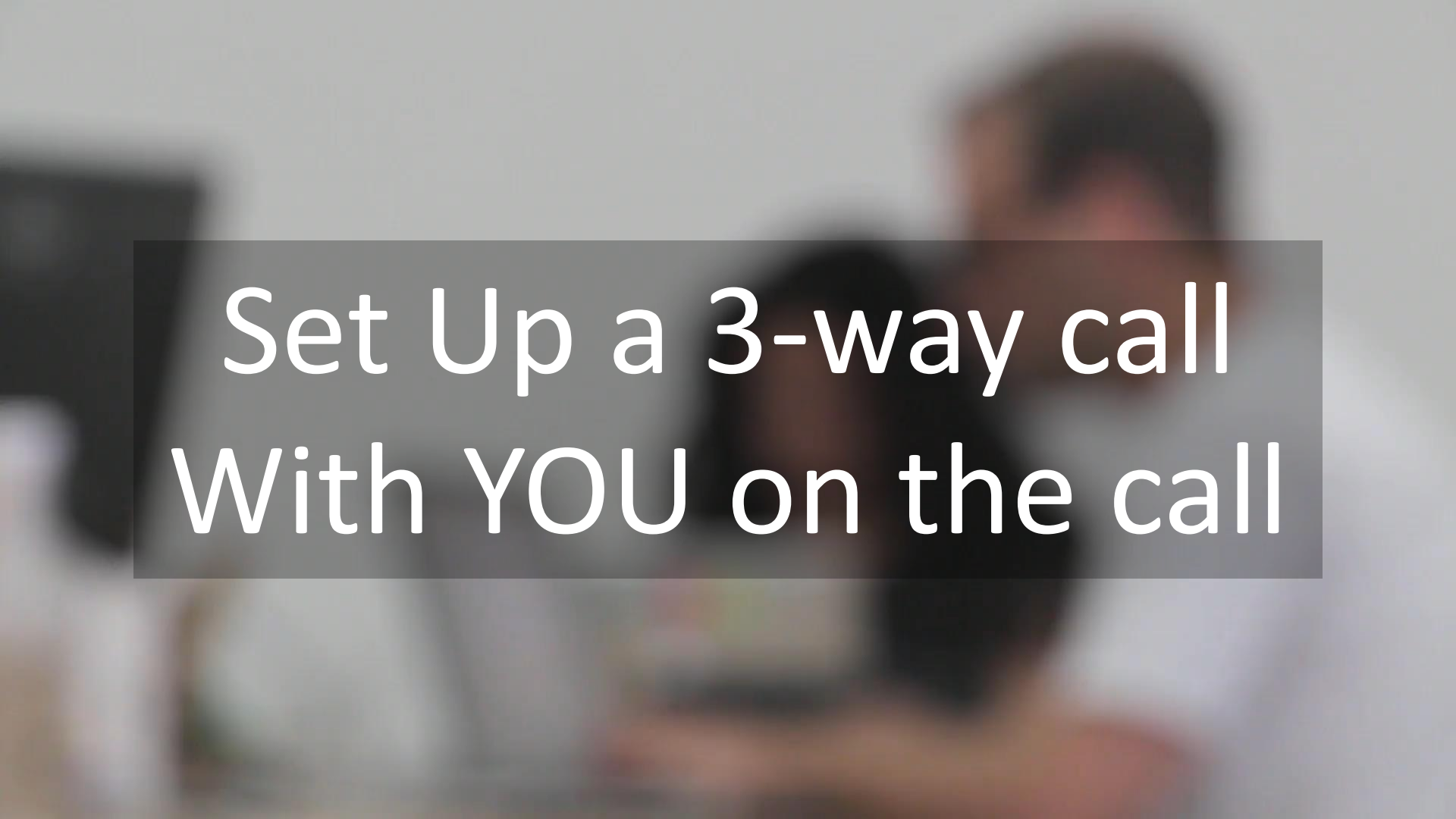
(which we encourage, welcome, and enjoy)

After an Ideal client is working with us and the SME team, who is the client directed to call if they have a tax or Estate Planning question?



Are they told to call the particular SME OR do we want all calls to come to us (the Adviser) first, then we direct the client to call the SME?

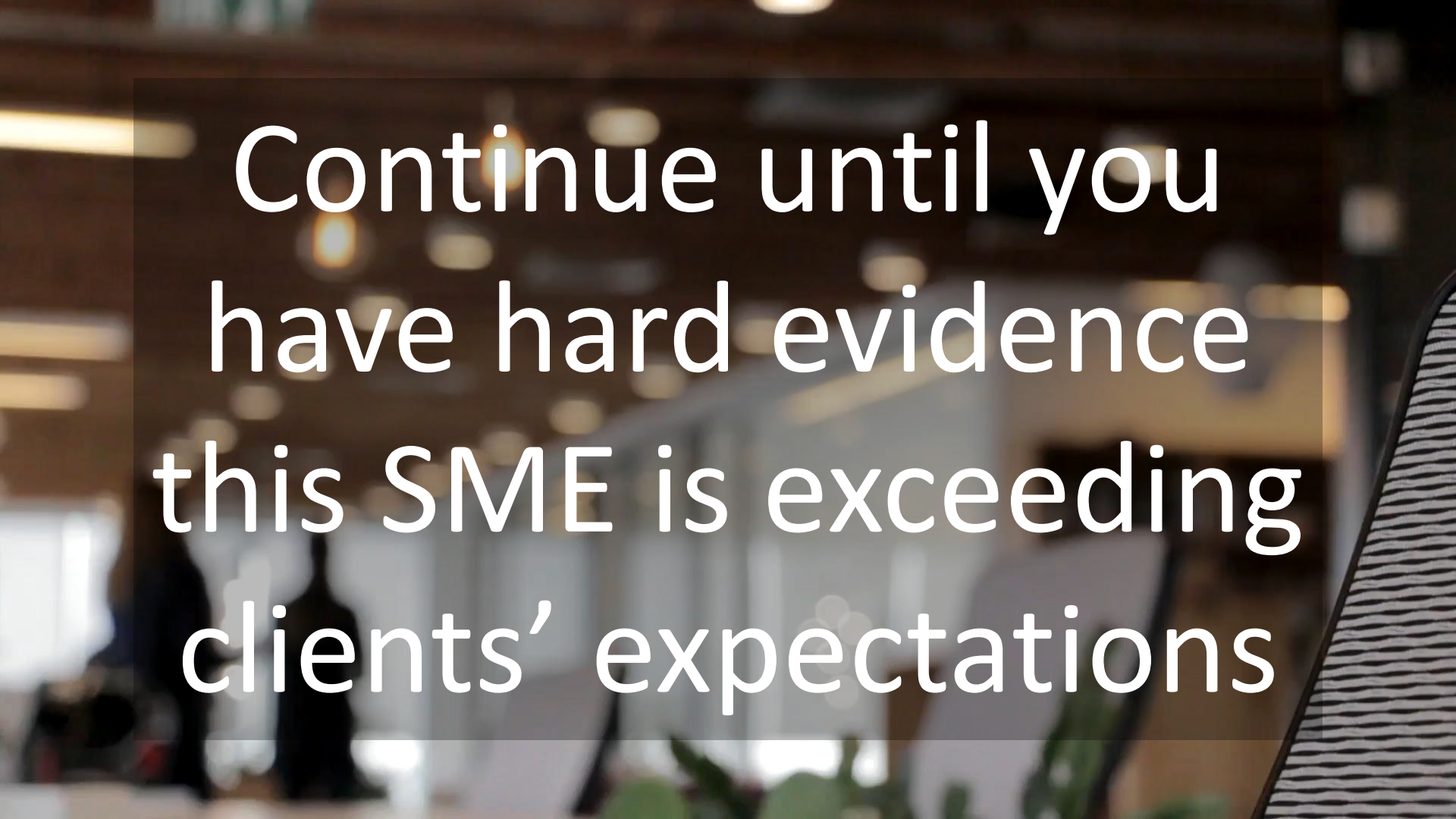
IF we direct them to call the SME directly, do we direct the SME to call us to fill us in?

The background of the image is a blurred photograph of several people in what appears to be a meeting or office setting. The focus is on the text overlay, which is a semi-transparent dark rectangle with white text. The text is centered and reads: "Set Up a 3-way call With YOU on the call".

Set Up a 3-way call
With YOU on the call



You Facilitate
Your SME takes the lead

A blurred background of an office environment. Several people are visible working at desks, and there are plants in the foreground. The lighting is warm and the overall scene is out of focus.

Continue until you
have hard evidence
this SME is exceeding
clients' expectations

A blurred background image of a person with dark hair wearing a headset, sitting at a desk with a computer monitor. The person is wearing a red shirt. The background shows a typical office or call center environment with shelves and other desks.

Always Require
The Interaction Log™
Within
1 Business-day



- ✓ **I understand that this is not a client acquisition focus, however I found you through Bill Bachrach's program and Bill highlighted how Mark acquired his clients by literally talking to hundreds of prospective clients.**
- ✓ **If possible can Mark spend a moment in a future call to address how he was so successful and how did he find so many people who were willing to talk to him and deliver the roadmap discussion??**

Mark's Client Acquisition Process

- ✓ **Marketing 101 Project**
 - **Invested 3 of 5 days/week out of the office**
(figured my potential clients aren't "in my office")
 - **Meeting people (just be a nice person)**
 - **Met with every new person at least twice**
 - **Never talked about my business (unless asked)**
 - **Simply identified those who meet my Ideal Client Profile**
 - **OBJECTIVES:**
 - **Build my reputation**
 - **Marketing 101:**
Most people don't even know who I am or what I do

Mark's Client Acquisition Process

- ✓ The Strategy That Works
 - Focused exclusively on this statistic: For every 7.8 Initial Client Interviews™ I acquired ONE (1) Ideal Client.
 - Therefore
 - I focused on people I met who happened to meet also my Ideal Client Profile: Always “of service” ...
 - Just “be a nice person”
 - Never initiated conversation about The Initial Client Interview™, but asked who they knew who might meet my Ideal Client Profile (I’m building a list)
 - I made sure I was “fishing in the right ponds”
 - Focused attention on people who had “money events” ... offered The Initial Client Interview™ if they were actively interested (asked me money questions)
 - Results in numbers
 - Conducted 648 Initial Client Interviews™ from Jan 2000 – Oct 2002 (Goal: 5/week)
 - Acquired 83 Ideal Clients in 34 months
 - Average: Acquired 2.44 Ideal Clients per month
 - No Financial Advisor yet has beat this Ideal Client Acquisition record

You have a unique opportunity
to get exactly what you need right now

ARTICLES

COURSES

Hi Mark! [Faves & Profile](#)

Financial Advisor Training



Referability

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with The Mark Of Mastery™

We're so glad to see you here! Click the button below for an overview of what you'll find inside The Mark Of Mastery™

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How I Acquired 1,242 Clients – New Course Coming Soon

MARCH 7, 2018 BY MARK LITTLE

FILED UNDER: [ACQUIRING CLIENTS](#)TAGGED WITH: [UPCOMING COURSES](#)[f Share](#) [t Tweet](#) [in Share](#)

WHAT ARE YOU STRUGGLING WITH?

As you may know, we are about to launch a new course for financial advisors. One of the most common question we receive from our members:

"How did a single advisor ever acquire 1,242 clients? What steps did you take to acquire that many clients?"

Ultimately, I transformed my business and now deal with a small client base. Nevertheless, the time has come to document all of the specific methods I used to acquire clients. But I could use your help.

While I'm putting the finishing touches on this material over the next few weeks, I want to share with you the process I used to acquire 1,242 clients. This is a new course coming soon, and I want to make sure it's as helpful as possible. So, I'm asking you for your input. What are you struggling with? What questions would you like answered from a Financial Advisor who's actually done it? What stands in the way of you adding more clients quickly?

Ask Me Anything

Let me know: What are you struggling with? What questions would you like answered from a Financial Advisor who's actually done it? What stands in the way of you adding more clients quickly?

What would you most like to know from a financial advisor who's acquired more than 1,500 new clients over the past 30 years? What questions do you have for someone who politely disengaged from more than 1,225 Non-Ideal Clients in order to focus only on Ideal Clients? What aspects of the Client Acquisition process have you never seen discussed and want to know more about?

Comment below with your top two questions about client acquisition, and I'll work them into the course. It's okay if you need some time to think about it—just bookmark this page, and come back when a client acquisition question pops into your mind.

So: **What are your two top questions about Client Acquisition that we absolutely NEED to answer in our new course?**

[— LEAVE A COMMENT](#)

Leave a Reply

[Logged in as Mark Oliver. Log out?](#)

Comment

You have an opportunity to drive the content in this course



Do we share The Financial Road Map® with all SMEs?

Let's say that I am working with the clients current Tax SME (I am still developing my Deliverables Team),
would I meet with them and show them how I work and
introduce to them our clients Financial Road Map®?

Financial Road Map® for Living Life on Purpose

"There are those who travel and those who are going somewhere. They are different, and yet they are the same. Successful people have this over their rivals: they know where they are going."
Mark Caine

What's Important to You?

Values

Get signatures from others

Name: _____

Where I Am Today

Cash Reserves		Growth/Income Assets	
Now	Be	Now	Be

Debt		Insurance	
Now	Be	Now	Be

Goals

Personal Goal Milestone

Personal Goal Milestone

Personal Goal Milestone

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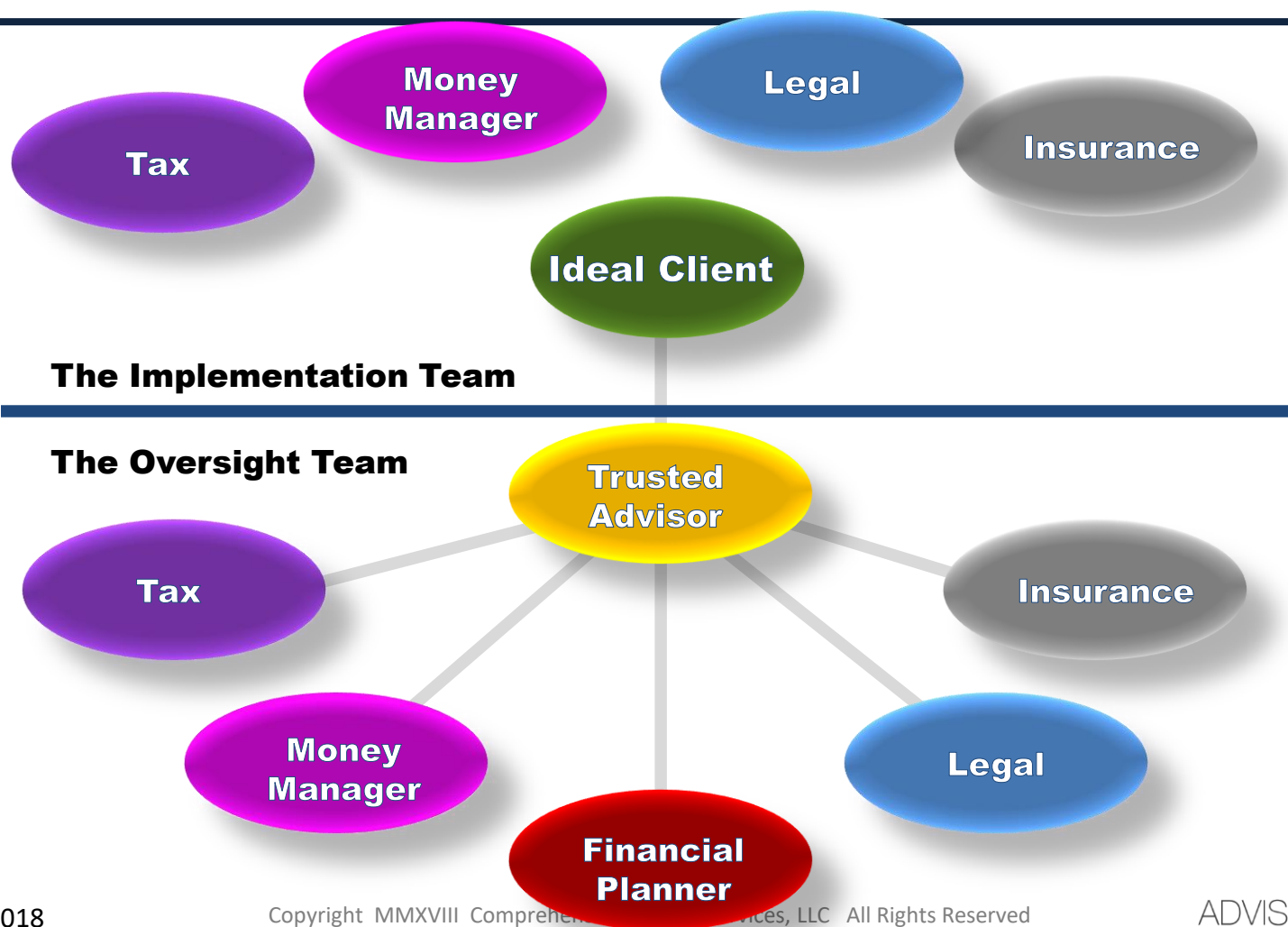
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When I or my AM call the clients current Tax or Estate Planning etc.. SME to ask the questions that you include in the “Deliverables-Comprehensive Lifetime Financial Strategy” (after the release is sent to the SME),



...is it best to tell the SME that I will be sending a rather long list of questions then give them a few days to follow up with the answers?



Communicating With The **Implementation** Subject Matter Experts

- ✓ Our joint client has asked me to oversee their overarching plan
- ✓ Our joint client has asked me to coordinate
- ✓ So whenever you have action items or recommendations for our client, coordinate with me first so we can ensure that your advice is perfectly aligned with the overarching strategy (this are our client's marching orders)
- ✓ Also, I can be of service to you... whenever you need anything from our joint client, please contact me immediately
 - ✓ ... I'll get it for you promptly
 - ✓ I meet with them every 4 months.
 - ✓ So please give me as much notice as possible
 - ✓ What will you be needing over the next 4 months from this client?



With whom do I share my “Ideal Client Profile” with?

Do I show it to clients? SME? Centers of Influence?

Share Your Ideal Client Profile With Everyone

April 17, 2018

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ADVISOR | PACT



Are all meetings with the SME' recorded (whether the client is present or not)?



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.