



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

June 19, 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

New Webinar to accelerate
your results with
The Advisor P.A.C.T. Monthly
Program™

The Advisor P.A.C.T. Monthly Program Overview

Bird's Eye View over the entire program exclusively for members of The Advisor P.A.C.T. Monthly Program™. The program creator provides an insightful overview focusing on the big picture.

If you're a new member or a veteran member who simply wants to maintain momentum Mark lays out his best recommendations as well as a simple 5-Point action plan for success with this program.

IMPORTANT NOTE: If you're new to our system, after registering **check your spam folder just in case your webinar confirmation goes there**

Mark Little

SCHEDULE

➤ Tuesday, 19 June 2018, at 8:00 AM

➤ Tuesday, 19 June 2018, at 10:00 AM

Next event starts in...

00 : 02 : 00 : 19

REGISTER NOW

Register at
www.AdvisorPACTpledge.com



- ✓ Is the “comprehensive written lifetime financial strategy” different from the “GPS” deliverable?
- ✓ And if so how is it different?
- ✓ And do you have a template example?

- The Essential Concepts Of Advisor PACT
- Vision and Goals | For Financial Advisors
- Annual Recurring Revenue Exercise
- Potential Client Interaction Time
- The Role of the Administrative Manager
- Hiring an Extraordinary Administrative Manager
- The Deliverables Team Recruitment Process
- Evaluating Your Deliverables Team
- The Ten Client Deliverables, Course 1 of 2
- The Ten Client Deliverables, Course 2 of 2
- The First 104 Days of a New Client Relationship
- Setting Your Compensation
- The Hero's Journey
- The Extraordinary Client Experience
- The Annual Referral Rate and Referability Dashboard

Manage portlets

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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 | For Financial Advisors

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...](#)



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.

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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.

Comprehensive
written lifetime
financial strategy
(overarching plan)

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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.
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The Greatest
Probability
Strategy™ (GPS)
step-by-step
implementation
plan-of-action.

Before we discuss comprehensive written lifetime financial strategy (overarching plan)...

...Let's first discuss the term
“Financial Plan”

The term “Financial Plan”
has **no meaning**

(means different things
to different people)

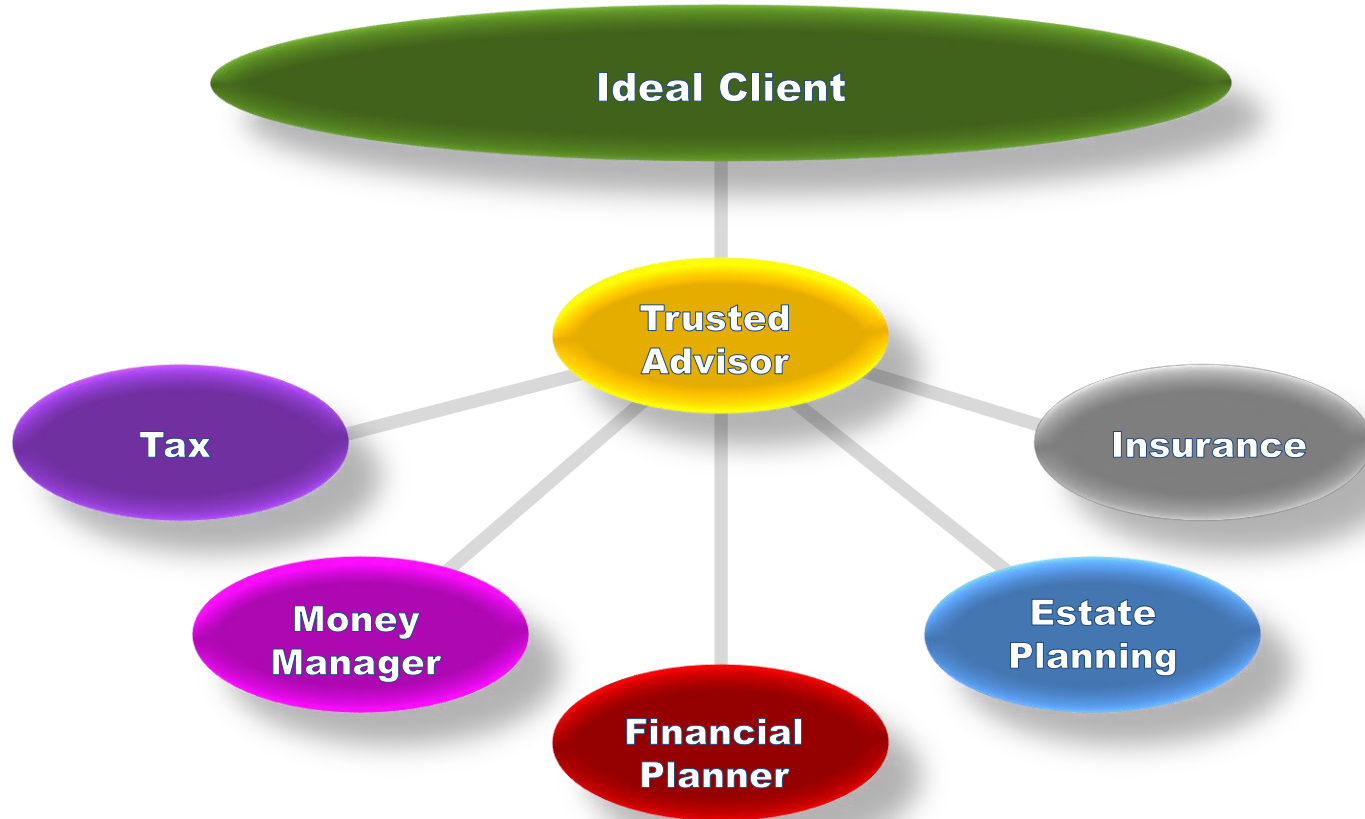
... therefore we **never use** the term “Financial
Plan” in our system.

We teach a

different concept

The Trusted Advisor's job is to ensure
that every Ideal Client has a
"comprehensive written
lifetime financial strategy"

The Advisor PACT™ Deliverables Team Structure



"comprehensive written
lifetime financial strategy"

We use that term
in lieu of "financial plan."

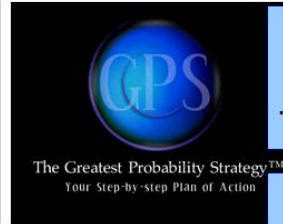
Since, in our system, all 5 SMEs are involved
in creating the comprehensive written
lifetime financial strategy.

We **don't** provide a sample,
So let me lay-out the **template** for you

(since your team is comprised of highly skilled SMEs who
already have their own way of doing things & we **don't**
want to micro-manage them)

Here's the guidance (template)
we do provide
for the creation of a proper
comprehensive written lifetime
financial strategy...

The Three Meeting Process™



The Initial Client Interview™

Client Meeting #1

Best Result:

Establish where you are now, and the specific goals you want to accomplish in order for you to experience those things that matter most to you.

Target: 14 Days

The Implementation Meeting™ (IM)

Take Action On Your Plan

Best Result:

- Begin implementing your comprehensive lifetime written financial plan
- Review your lifetime GPS Action-Plan for every year of your life for which our team has a recommendation

Target: 45 Days

The Initial Progress Update Meeting™ (IPU)

Follow-up on Actions Taken - Best Result: Measure progress since The Implementation Meeting on your actions taken

The Comprehensive Safety Review™ (CSR)

Address Every Risk to Your Plan

Best Result:

- Recommendations from full insurance review
- Review of Key Progress Reports
- Review your GPS Action-Plan

Target: 45 Days

Target: 4 Months

Target: 4 Months

The Annual Review™

Update your comprehensive lifetime written financial plans

Best Result:

- Review recommendations from the comprehensive written strategy for Cash Reserves
- Review recommendations from the comprehensive written strategy for Debt
- Review of Key Progress Reports
- Review your GPS Action-Plan

Target: 4 Months

The Goal Progress Outlook™ (GPO)

Measure Your Progress Against Your Goals

Best Result:

- Review Strategic and Tactical written plan for every goal
- Recommendations from comprehensive review & update of your Estate Plan
- Review of Key Progress Reports
- Review your GPS Action-Plan

The comprehensive written lifetime financial strategy completed prior to this point
(prior to 104 days)

The Starting Point (5 plans... **one from each SME**)

A comprehensive written lifetime financial strategy has **several specific components**
& is the merger of ALL of the following:

1. **A Customized Tax Plan**: Strategies & tactics developed for this client by a Tax Planning Subject Matter Expert
2. **A Customized Estate Plan**: Strategies & tactics developed for this client by an Estate Planning Subject Matter Expert
3. **A Customized Money Management Plan**: Strategies & tactics developed for this client by a Money Management Subject Matter Expert
4. **A Customized Safety Plan**: Strategies & tactics for mitigating all risks & for increasing the safety of the client's strategies, developed for this client by an Insurance Subject Matter Expert
5. **With A Customized Financial Plan wrapped around all of the above**: Strategies & tactics developed for this client by Financial Planning Subject Matter Expert pulling together all of the above & establishing a plan to accomplish the clients goals by the target dates established by the client.

Then there are 5 elements of a comprehensive written lifetime financial strategy

This is the **punch-list** used by the Trusted Advisor at the end of the first 104 days of every client relationship to ensure everything "got done" by the SMEs:

1. All 5 plans above
2. A lifetime capital projection
3. A Cash Reserves Plan (Cash Reserves strategy & target amount)
4. A Debt Plan (schedule)
5. An "Assumptions Page" for each of the 5 areas of personal finance

Your client does
not receive a copy of
The comprehensive written lifetime
financial strategy

(It's an internal document your team uses to “execute”)

If that's the comprehensive written
lifetime financial strategy...

...then what's the GPS?

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The Greatest Probability Strategy™ (GPS)

For Lynn & Ted Smith's May 22, 2008 Initial Progress Update™



Action Items for the year 2008

ACTION ITEMS DUE BY JULY 9th:

- **NEW ITEM:** Lynn & Ted – Your goal funding is off-track. In order to get your goal funding on-track, you will need significant additional goal funding (see The Goal Blueprints™). Unless you have ideas for additional revenue over the next 5 years, we recommend Lynn to consider returning to a full-time work schedule, returning to her director level salary (and benefits) at Microsoft until December 31, 2014.
- A. Lynn & Ted – Discuss with Mark the action items that were not completed since the Implementation Meeting™ last month. If ever you are unable to complete an action item, please let us know in advance so we may help you. The overdue items are: (7T8)
 1. Let Mark know the status of your account at LifeUnLock. (2T2)
 2. Please send Mark a copy of your most recent credit report. (2U6)
- B. Lynn & Ted – Sign the paperwork provided to consolidate and simplify your various accounts by moving your CapitalTwo account ending x1245 and your National Bank Checking account ending x1234 into your new ANG Electric Orange high yield money market account. (5Z7)
- C. Lynn & Ted – The tax return prepared by Ernest Young yielded a refund of taxes you overpaid. We recommend that you adjust your withholdings to stop your tax over-payments. Therefore, sign the included W-4 forms and submit them to your HR departments to have your withholdings adjusted. (4T5)
- D. Lynn & Ted – In the last meeting, you indicated that you might want to provide a monthly stipend to Aunt Millie. Please inform Administrative Manager what you both decided so that the Team can give you a recommendation on where the money should come from. (8P2)
- E. Lynn & Ted – Review The Legacy Flow™ and The Legacy Flow II™ to determine if there are any changes on how you would like your estate to pass to your beneficiaries after your death, and whether you want to change any of the named persons that will act in your behalf if you are unable.
 - Inform Mark if there are changes to your wishes so we can have Robert T. Barnes III prepare paperwork for you to sign in our next meeting.
- F. Lynn & Ted – Inform Administrative Manager if there are any anticipated streams of revenue after you stop working, other than from your current investments and social security. (4V3)

NOTE: The action items in this sample bear letters simply for training purposes, and should NOT be included on your final version

The Greatest Probability Strategy™ (GPS)

For Lynn & Ted Smith's May 22, 2008 Initial Progress Update™



ACTION ITEMS DUE BY THE END OF THE YEAR: December 31, 2008

Lynn & Ted – Allow Mark to coordinate with Ernest Young to complete a 2008 tax projection by August 31st. (6C2)

ACTION ITEMS DUE FOR FUTURE YEARS:

2009:

- **TED'S MEDICARE:** Ted turns 65 on December 8. Three months before your 65th birthday, contact Bob Lohrman, and the two of you will call 1-866-772-1213 to apply for Medicare.
- **Lynn's Retirement Plan Distributions:** At our November progress meeting, we will discuss your updated retirement plan distribution tactics since you will be eligible for penalty-free distributions in February 2010.
- **Ted – Renew your driver's license before your birthday.**

2010:

- At our November progress meeting, your Team will implement Ted's updated plan for Social Security distributions to commence in December 2010.
- **Lynn – Renew your driver's license before your birthday.**

2012: Conduct a full estate plan review with Robert T. Barnes III prior to our July progress meeting.

2013: Ted – Renew your driver's license before your birthday.

2014:

- **TED'S SOCIAL SECURITY:** Begin Social Security distributions. The process will begin three months prior to your 70th birthday.

Lynn – Renew your driver's license by August 22nd

At our November progress meeting:

- Confirm your desire to stop working at the end of the year, and enjoy your Financial Independence beginning January 1st, 2015. Your Team will have your company's "30-day notice" form ready for your signature (to be submitted prior to November 30).
- Confirm your desire to have \$100,000 on a yearly basis to achieve your Help Family Fund. Your Team will recommend the best way to fund this goal, starting on January 1st, 2015.

2015:

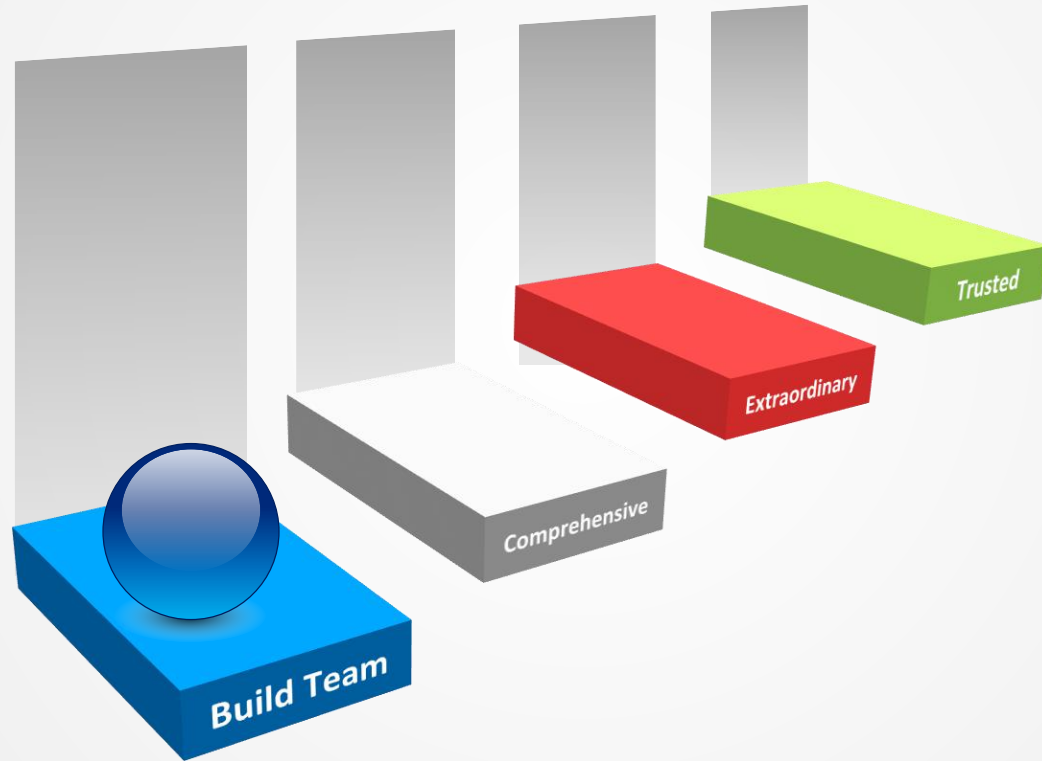
- **LYNN'S MEDICARE:** Lynn turns 65 on December 8. Three months before your 65th birthday, contact Bob Lohrman, and the two of you will call 1-866-772-1213 to apply for Medicare.
- Your Team will inform you, by your July progress meeting, of the best way to pay for your Dream Jacuzzi on November 21st.
- Mark will schedule a meeting with Ted and Lynn by November 30th to determine timing of required minimum distribution from IRA accounts.



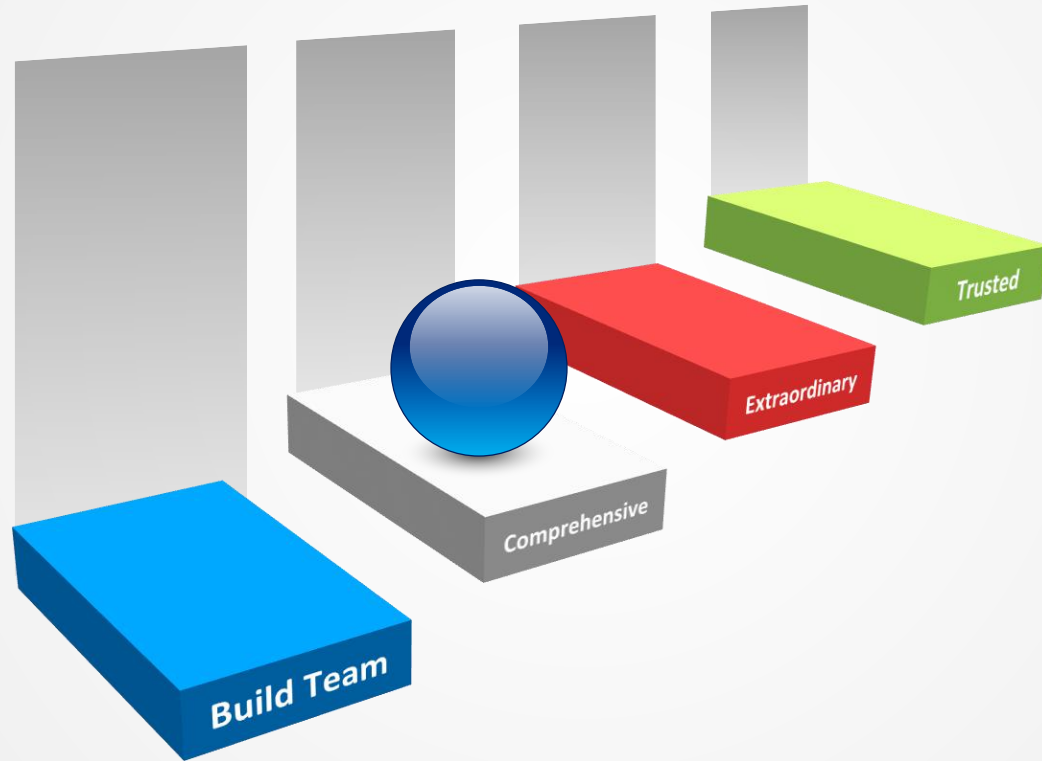
- ✓ I've scheduled a strategic planning session with my entire team in 2 weeks. I want us to brainstorm how to add more value to our Ideal Client's financial lives.
- ✓ But I want to also set the vision for Truly Comprehensive Financial Services™ so that everyone is on the same page.
- ✓ Any thoughts?

Delivering
on the promise
of
Truly Comprehensive
Financial Services™

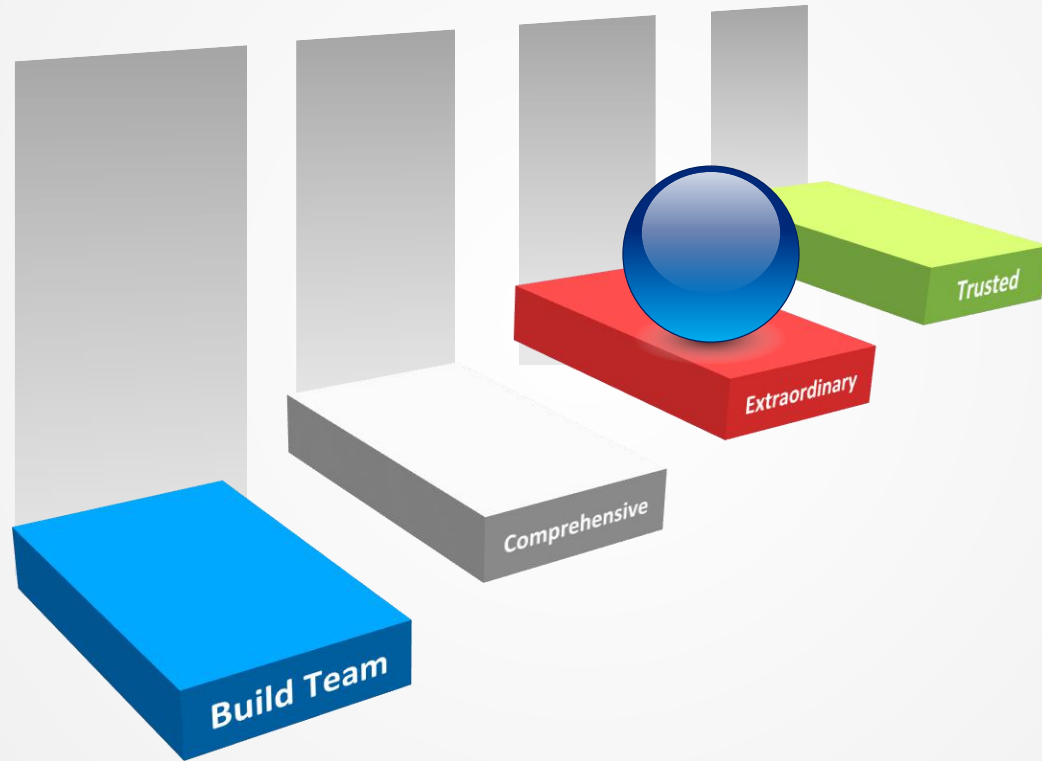
Delivering on The Promise



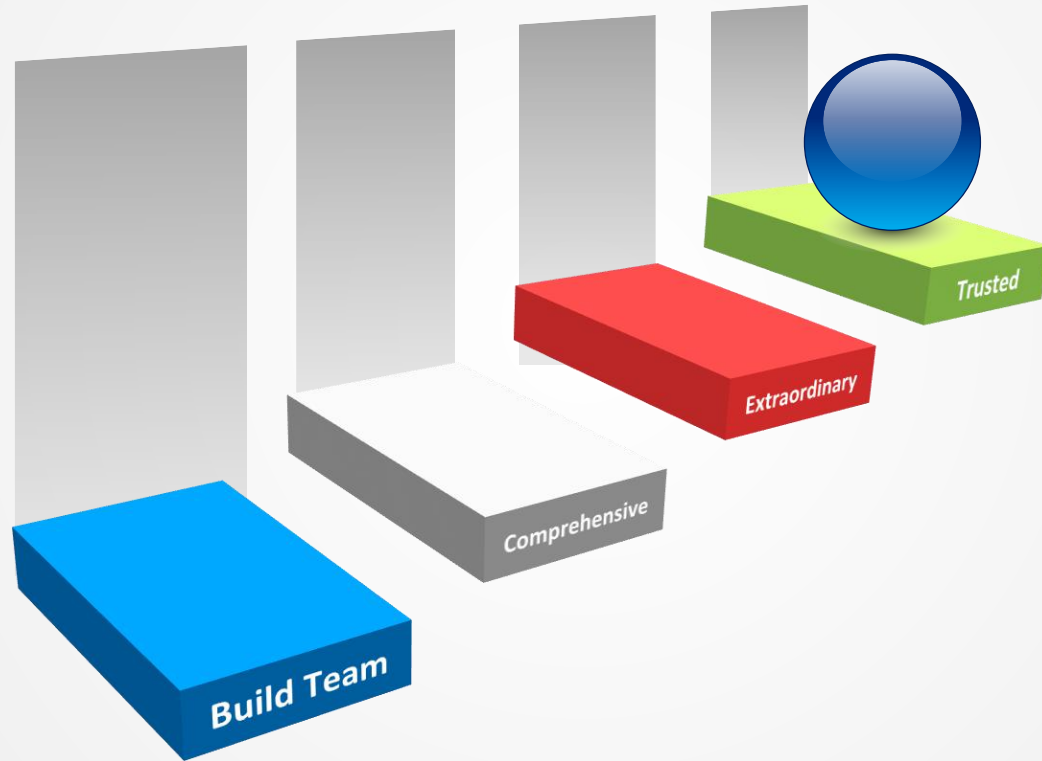
Delivering on The Promise



Delivering on The Promise



Delivering on The Promise

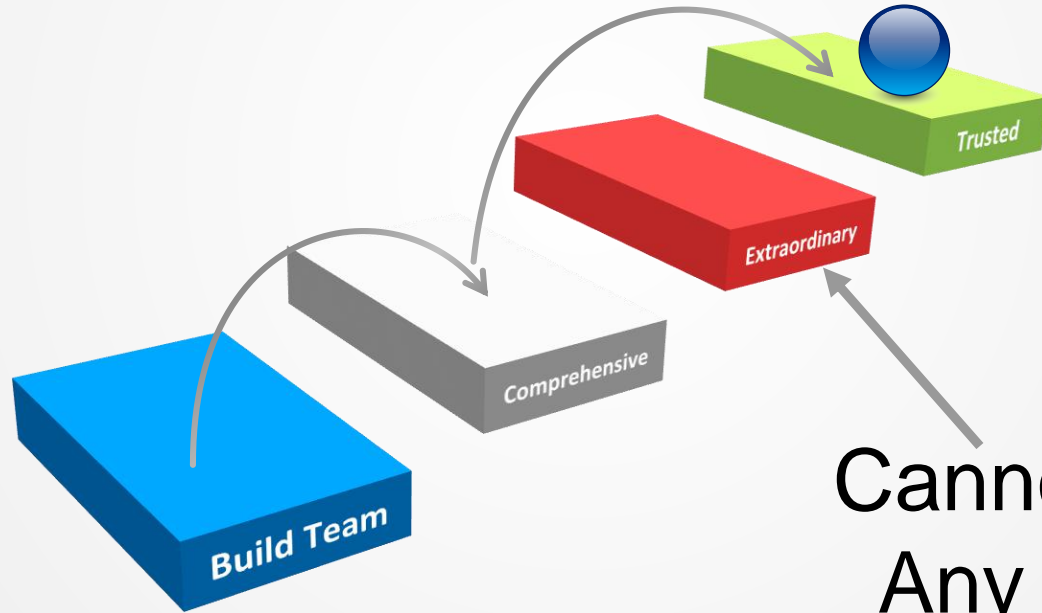


Delivering on The Promise



4 These Are The Tactical Steps For Delivering On The Promise Of Your Advisor PACT™

Delivering on The Promise



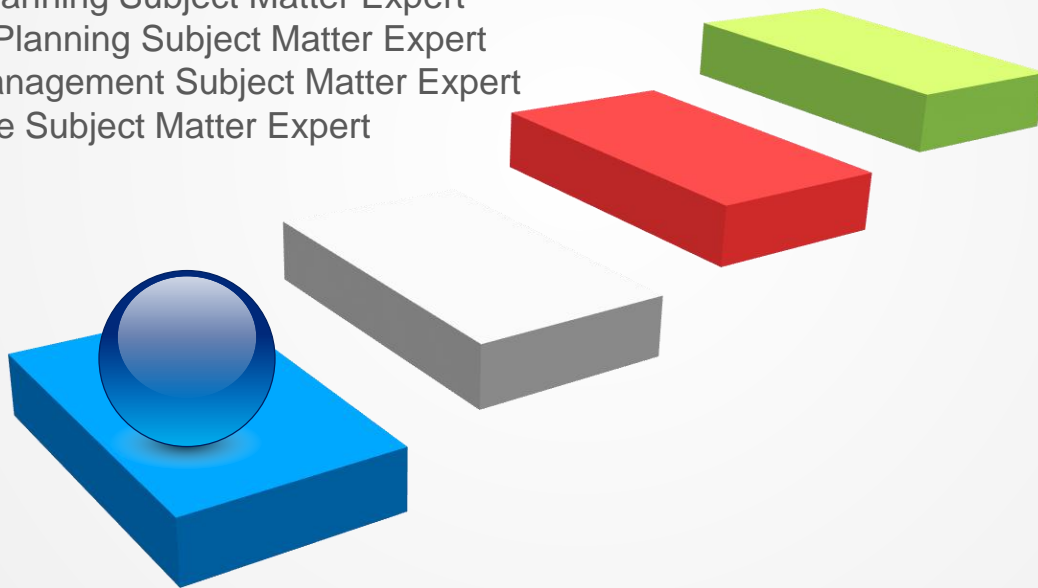
Cannot **Skip**
Any Steps

Delivering on The Promise – Build Team

Build & Lead Your Team

We're going to build a team of highly skilled Subject Matter Experts.

- ✓ A Tax Planning Subject Matter Expert
- ✓ An Estate Planning Subject Matter Expert
- ✓ A Financial Planning Subject Matter Expert
- ✓ A Money Management Subject Matter Expert
- ✓ An Insurance Subject Matter Expert



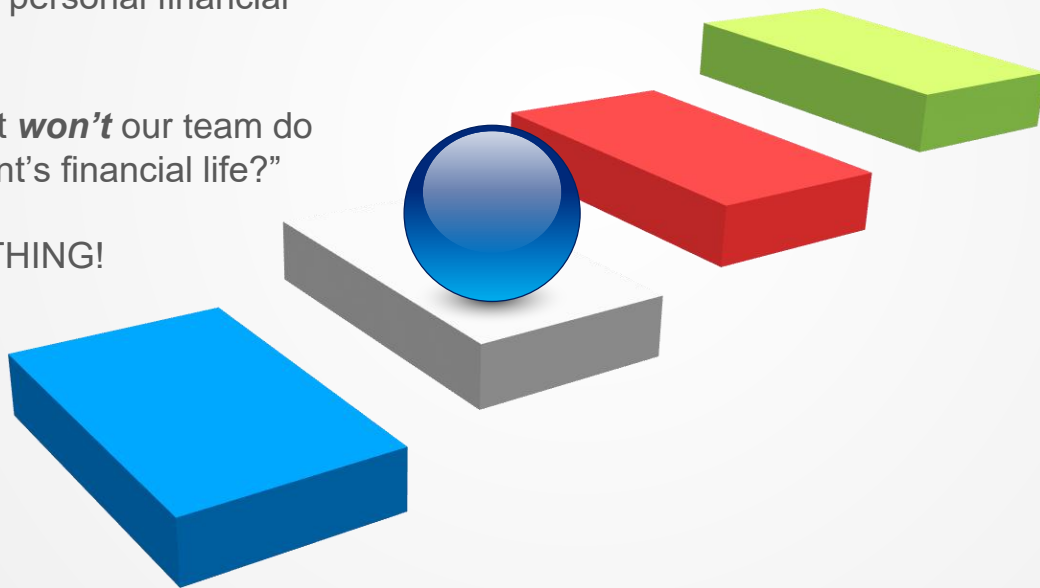
Delivering on The Promise - Comprehensive

Implement Truly Comprehensive Financial Services™

Our skilled team of Subject Matter Experts will coordinate all aspects of an Ideal Client's personal financial affairs.

"Potentially what **won't** our team do for an Ideal Client's financial life?"

Answer: ... NOTHING!



Delivering on The Promise - Extraordinary

Delivering an Extraordinary Client Experience

Our team **won't stop** increasing value to our clients until

- ✓ We will consistently exceed our Ideal Clients' expectations
- ✓ We become indispensable to Ideal Clients
- ✓ Our referral rates increase
(I'm meeting with new potential clients every day)

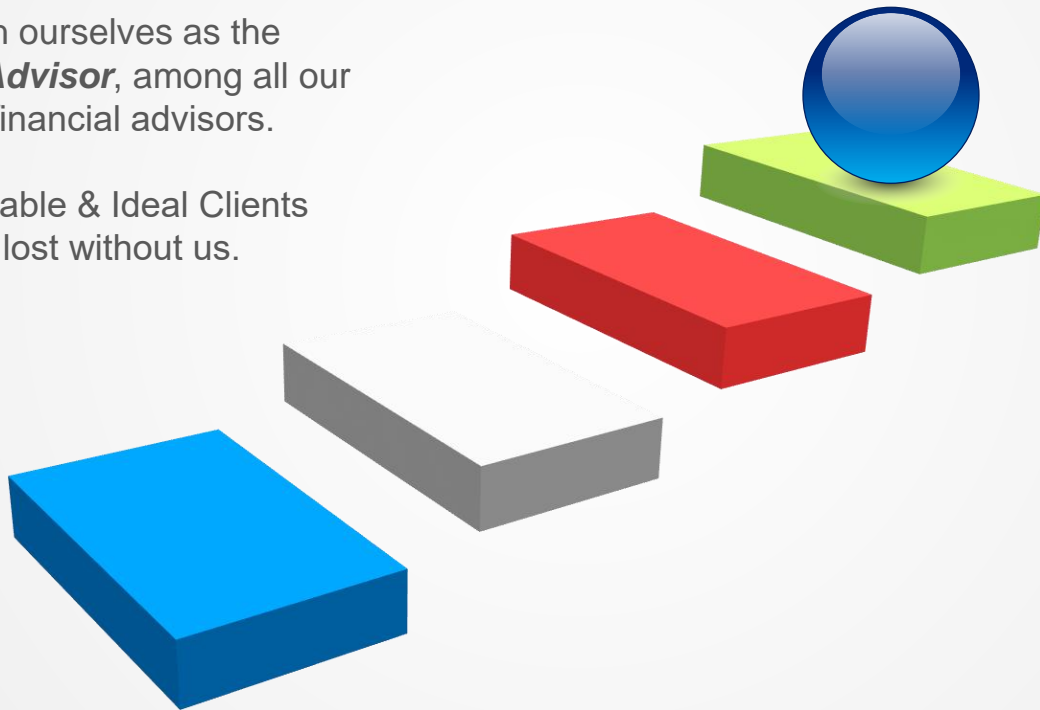


Delivering on The Promise - Trusted

Become The **Most** Trusted Advisor

We will establish ourselves as the ***Most Trusted Advisor***, among all our client's various financial advisors.

We're indispensable & Ideal Clients tell us they'd be lost without us.



Delivering on The Promise

We're a financial services **monopoly**

We're the only game in town.

For what we do, potential clients have
no other option than utilizing us

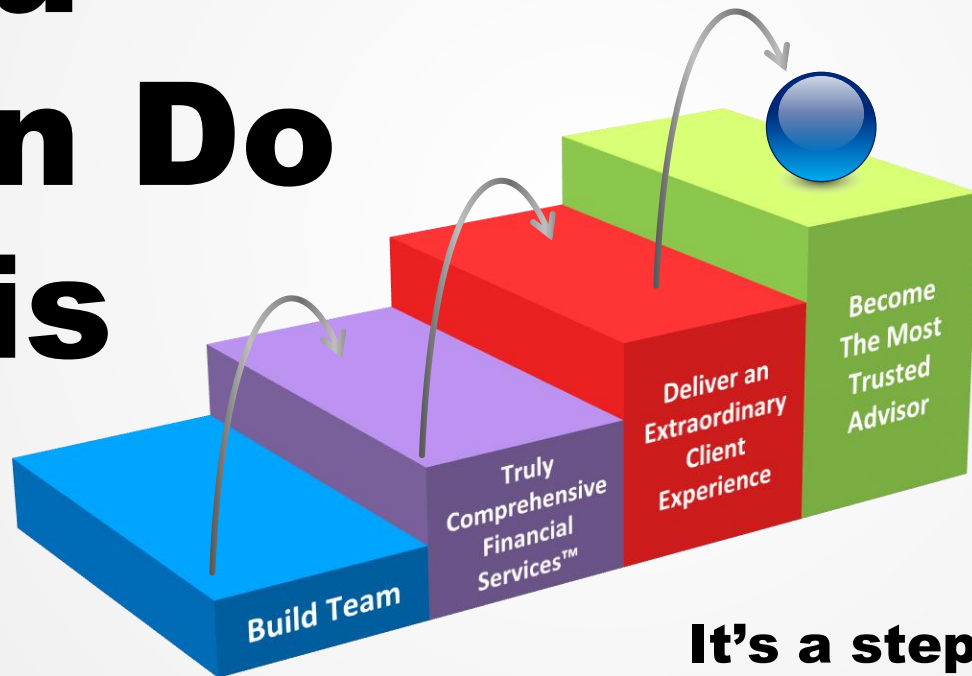


Delivering on The Promise

ADVISOR | PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

**You
Can Do
This**



It's a step-by-step process



- ✓ **My compliance department has questions about my new fee. In elevating my service to Comprehensive Financial Services (through Advisor PACT™ methodology),**
- ✓ **I'm now raising my fee for Ideal Clients to \$27,000/year.**
- ✓ **Prior to this, my highest service level was \$6,000 (+ a % of AUM).**
- ✓ **How do I explain such a large jump in compensation to my compliance people?**

Advisor PACT™ – Your Business Structure

20%

**Investment
Advice**



You'll be
providing
Ideal Clients
2 types
of advice

**Non-
Investment
Advice**



80%



Advisor PACT™ – Your Business Structure

20%: Investment Advice

Through a Registered Investment Advisor
(Set up your own RIA?)

Run 20% of your fee through the RIA

80%: Non-Investment Advice

As an Outside Business Activity (OBA)
(set up an entity for your OBA)

Run 80% of your fee through your OBA

**You'll be compensated through
2 separate entities**
(cleaner compliance)

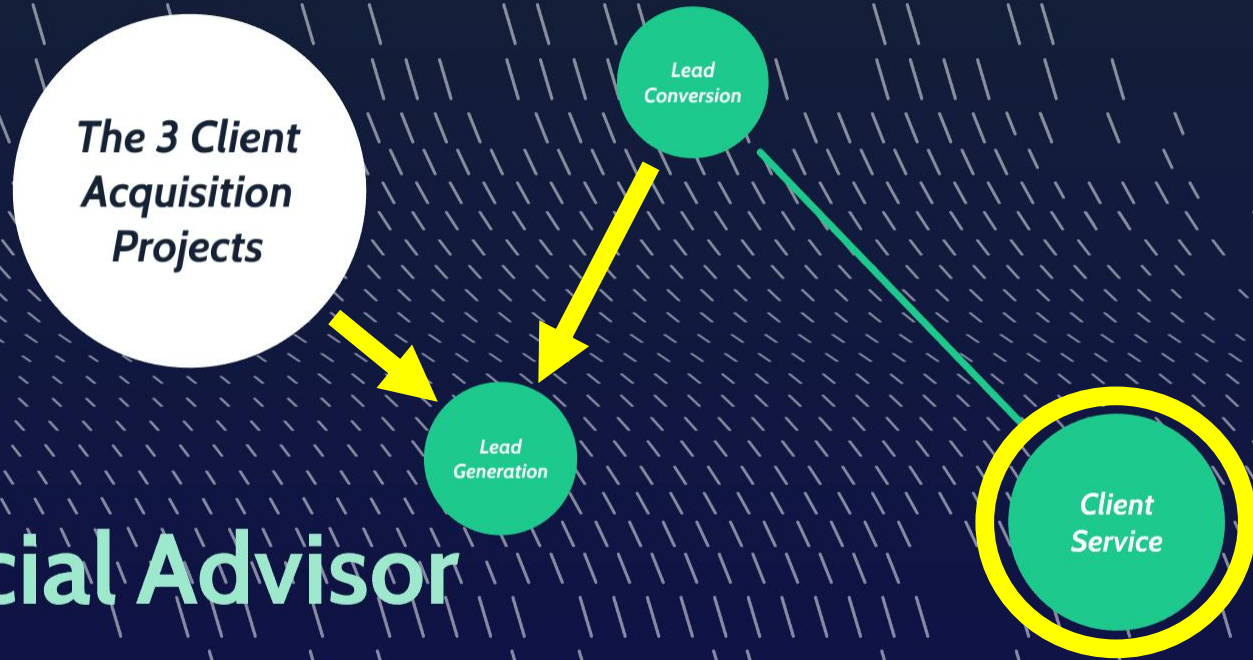
Being compensated \$27,000/year means your **mission objective** is now to...

- ✓ **Deliver** on the promise of Truly Comprehensive Financial Services™ through a skilled team of Subject Matter Experts
- ✓ Deliver an **extraordinary** client experience
- ✓ Become **indispensable**
- ✓ Ensure that when your Ideal Clients walks out of **each** meeting they think, “that meeting was important & that meeting was **worth** \$9,000 to me”

Are you generating a ton of
leads to people who want to
sit down with you to
“discuss doing business?”

Is your schedule always filled
with people who want to
“talk business?”

Financial Advisor Mastery



How I Acquired 1,242 Clients

MAY 17, 2018 By [Mark Little](#) Filed Under: [Acquiring Clients](#) Tagged With: [Upcoming Courses](#)

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As you may know, we are about to launch a new course for financial advisors based on the #1 question we receive from our members:

“How did a single advisor ever acquire 1,242 clients? What specific methods did you use to acquire that many clients?”

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

While I'm putting the finishing touches on this material over the next few weeks, I invite you to leave a comment below with any client acquisition-related questions you have.

Maybe you're curious about how I quickly and effortlessly acquired new clients, even though I'm introverted, have call reluctance, and have a low tolerance for clients who aren't serious about their goals. Or maybe you have a question about how I inspired my clients to provide a consistent stream

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 top two 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



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.