



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

July 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

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



- ✓ I was wondering if your business card says anything such as “Financial Consultant” “or “Financial Advisor”.
- ✓ Mine says “Financial Consultant” but my guess is that yours does not.
- ✓ I was thinking of changing it to “Comprehensive Financial Strategist” or “Truly Comprehensive Financial Strategist”.

Mark McKenna Little

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SKU: 509BC

Engraved Business Card

Ink color options available

50 (\$5.48 each) \$174.00

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Product Details

Prestigious and elegant, hunter green type is paired with our ocre paper for this sample business card. A perfect choice for the company with an esteemed legacy.

Customize this product with your brand identity. Here's how to [submit your logo or artwork](#)

✓ You mention “Coordination or Overarching Strategy”.



- ✓ Can you please give some examples or a definition as to what this means?
- ✓ It may seem pretty self explanatory, but I would like to hear how you would define these terms or how you would explain what this means if you had to further “flesh” them out for a client.
- ✓ I find that most people do not have an “Overarching Strategy” or things coordinated so it might be helpful if we can provide them with an example if they ask etc...
- ✓ I feel that it is a lot more than “just” coordinating with the various SME.

Coordination & Overarching Strategy are two different concepts

The Advisor PACT™ Financial Services Model

Coordination is the ongoing activity of pulling together all the elements of your client's financial affairs



Coordination = coordinate people and things

- ✓ Coordinate the others on your team
- ✓ Coordinate the others your client has on their team already
- ✓ Coordinate your client's financial assets
(all the pieces and parts of their financial affairs)
- ✓ Coordinate all your client's future recommendations

Overarching Strategy = “The Plan”

Overarching Strategy = “The Plan”

"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.

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



- ✓ **Do you have any “must have” Deliverables that you provide to pretty much every client?**
- ✓ **I know that each of your SME have their own list of deliverables and those that you give the SME as you outline their responsibilities, but is there, or do you have YOUR top 5 or so (knowing that every client is unique) deliverables that you make sure every client receives?**

[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](#)You are here: [Home](#) / [The Monthly Project™](#)[Contents](#) [View](#) [Edit](#) [Sharing](#)[Actions](#) [Display](#) [Add new...](#) [Status: Internally published](#)

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



The Ten Client Deliverables, Course 1 of 2

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

[Read more...](#)

The Ten Client Deliverables, Course 2 of 2

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

[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

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

[Read more...](#)

The Ten Client Deliverables, Course 2 of 2

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

[Read more...](#)

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...](#)

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...](#)

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 Ten Client Deliverables™

1

2

3

4

5

6

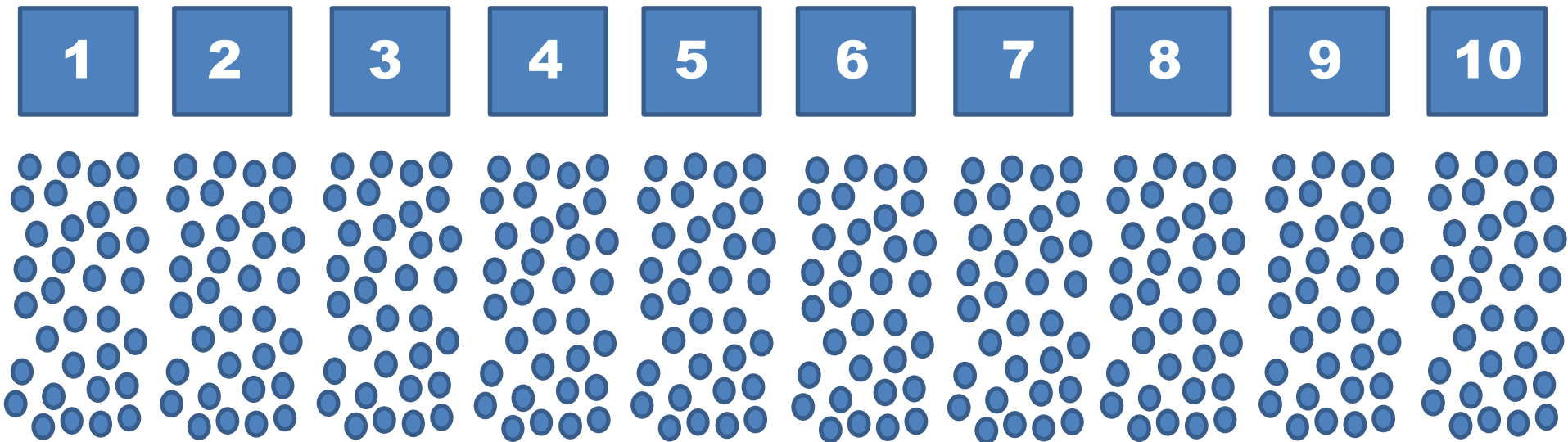
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The Ten Client Deliverables™



The 142 Deliverables Checkpoints™

RESULT:

The 3 Bottom-Line Client Outcomes

1

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4

5

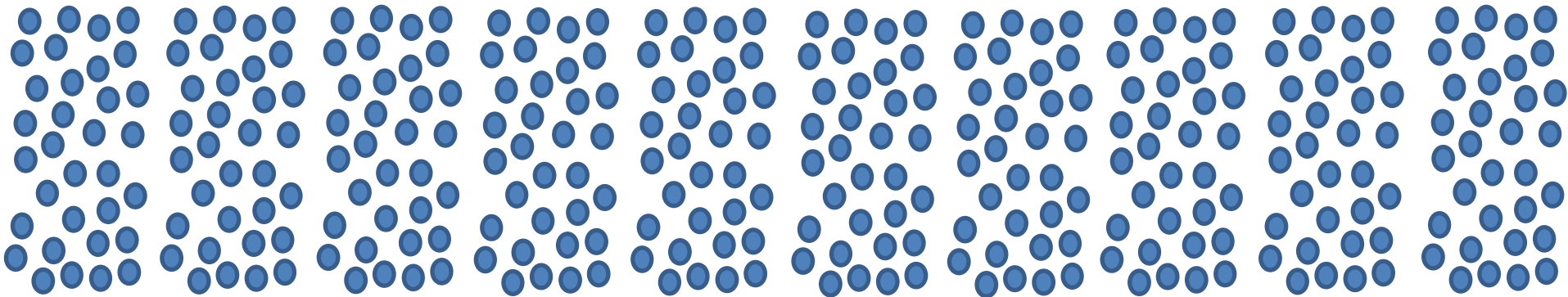
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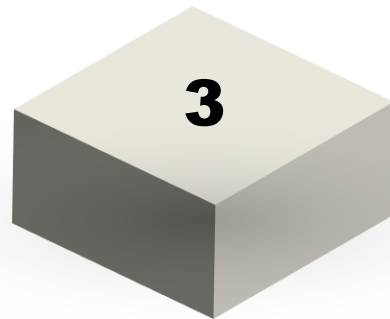
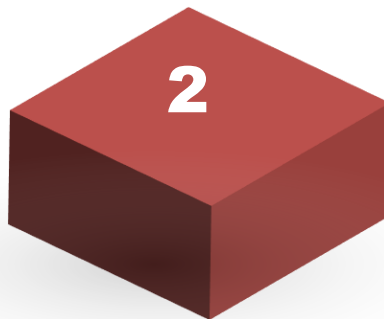
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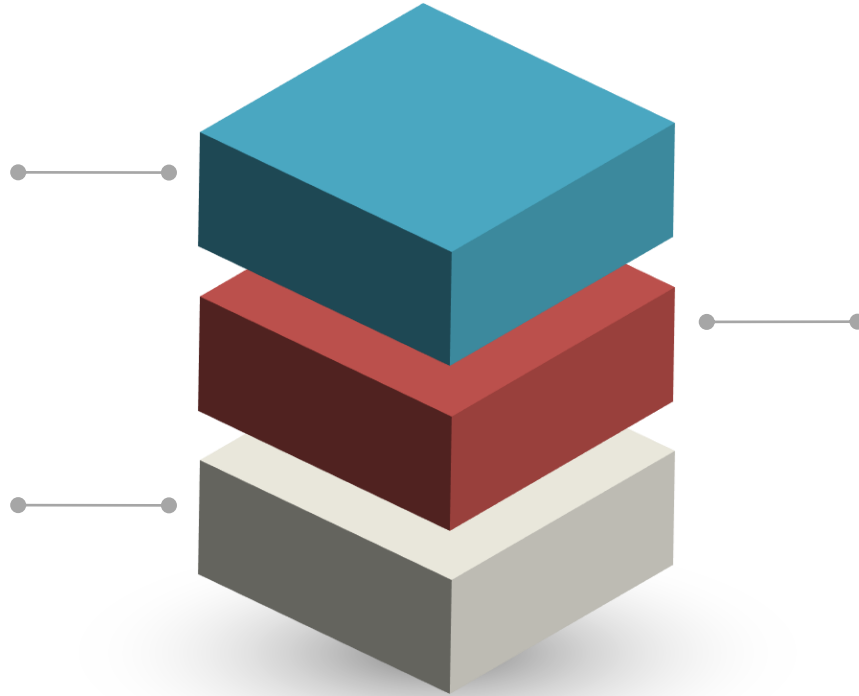
The 3 Bottom-line Client Outcomes

Remain On-track
To Goals

Always on-track to
your goals

Make better
financial decisions

Make **smart choices**
about your money in
all areas along the
way



Proactive on
financial issues

Take **Opportunities**
No **Surprises**

- ✓ The Ten Client Deliverables™
- ✓ Deliverables Checkpoints™:
Each of the 10 deliverables are comprised of a series of checkpoints in to ensure the deliverable is completed (a checklist)

Trusted Advisor Activity

Results of the Activity

- ✓ The 3 Bottom-line Client Outcomes

*All of this is done for **EVERY** Ideal Client annually*

Finally

As you're delivering
The Ten Client Deliverables™
Consider

Custom Deliverables Checkpoints™

For individual Ideal Clients in your effort to
exceed clients' expectations

A diagram illustrating the three client acquisition projects. A large white circle on the left is connected by teal lines to three smaller teal circles on the right. The teal circles are labeled 'Lead Generation', 'Lead Conversion', and 'Client Service'. The 'Client Service' circle is highlighted with a thick yellow border. The background is dark blue with a pattern of white diagonal lines.

*The 3 Client
Acquisition
Projects*

*Lead
Conversion*

*Lead
Generation*

*Client
Service*

**Financial Advisor
Mastery**



- ✓ **What's the secret of The Advisor PACT™ method?**
- ✓ **What makes it different or better than other methods?**

What drove me to create The Advisor P.A.C.T. Method?

- ✓ I hated the traditional Client Acquisition methods
 - ✓ I disliked sales tactics (scripts & closing techniques)
 - ✓ I disliked the fast-qualifying methods I was taught
 - ✓ View everyone you meet as a potential client
 - ✓ Evaluate their potential as a client on-the-spot
 - ✓ Recommend an appointment (or a follow up for business)
... all during the initial conversation
- ✓ I had a theory that by allowing relationships to develop naturally, I'd acquire clients more quickly. I was **right**.
- ✓ I suspected that nearly every client knew more people than I could possibly ever serve I was **right**.

Simple concept that *differentiates*
The Advisor PACT™ Method...

...A focus on *consistently exceeding*
Ideal Clients' Expectations will substantially
accelerate Client Acquisition

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**Financial Advisor
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What I **recognized** about the financial services industry

- ✓ Most Financial Advisors only give lip-service to being “client centered,” but are unwilling to make the effort.

APM requires an **above-average work-ethic** (most FAs unwilling)

- ✓ Most Financial Advisors are indistinguishable from each other
APM establishes FAs as **higher caliber** (expertise, skill, capability)

- ✓ Most Financial Advisors who have a team don't have a team goal

APM requires FA to continually hold each team member accountable to **exceeding** Ideal Clients' expectations

What distinguishes The Advisor P.A.C.T. Method?

- ✓ Keeps entire team relentlessly focused on exceeding clients' expectations (at **every** client progress meeting)
- ✓ Utilizes The Annual Referral Rate™ (TARR) as the team's measure of client satisfaction (as a result client referral rate **increases**)
- ✓ “Client Service” becomes the primary driver of Client Acquisition (unlike **any** other financial services methodology)
- ✓ Unlikely a client can easily find another advisor willing and able to serve at this level (often **“The Only Game In Town”**)

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*Lead
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*Client
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**Financial Advisor
Mastery**



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.