ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT Monthly Session™

October 16, 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

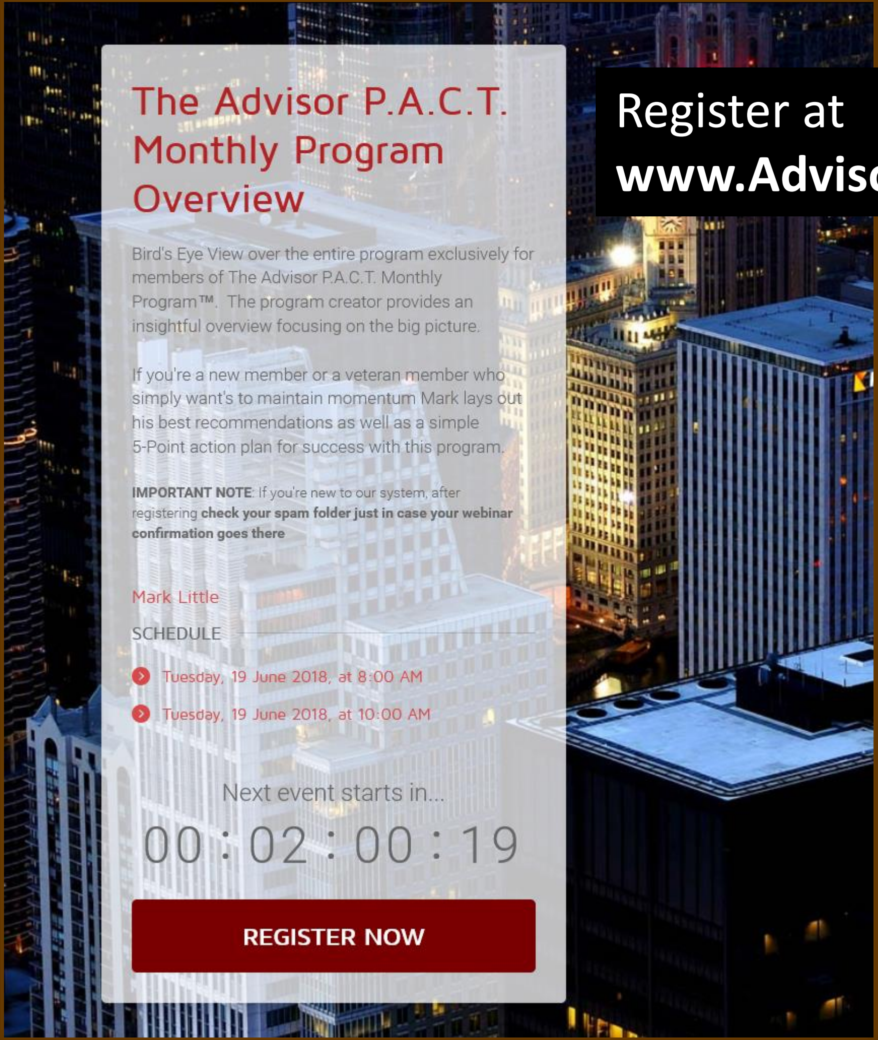
COORDINATION

TRANSPARENCY

To every Ideal Client

New Member 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 want's 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

Register for the webinar at

www.AdvisorPACTpledge.com

I have a new Administration Manager starting on Monday and we would like for her to get up to speed as quickly as possible;

what course of action would you recommend?

Titles Finan Advisors ften Utilize

- istrative Assistant
- Exe Assistant
- Sales nt
- Office Ad rator
- Administrat rdinat
- Administrative list
- Office Manager
- inistrator

External Title

✓ Administrative Manager

Internal Title

✓ Project Leader

What's The Project?

✓ **All Client Interactions:**
Exceed clients' expectations

- *Client progress meeting preparation*
- *Inbound & outbound calls & emails*
- *All Client Interactions*

The Team Goal

- ✓ Trusted Advisor: Team Leader
- ✓ Administrative Manager: XO
- ✓ Deliverables Team Members (SMEs): Invited onto the team only if they fully embrace The Team Goal.

The Team Goal

- ✓ **The Team Goal**: We will deliver The 3 Bottom-line Client Outcomes to every Ideal Client in a manner which exceeds their expectations.
- ✓ **Measurement**: The most direct measure of success of The Team Goal are consistent increases in The Annual Referral Rate (TARR)
- ✓ **Success**: We will have achieved The Team Goal when we are consistently experiencing five (5) Initial Client Interviews per week attributable to spontaneous unsolicited client referrals

The 3 Bottom-line Client Outcomes

Remain On-track To Goals

Always on-track to your goals

Proactive on financial issues

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

Make better financial decisions

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

Requesting Modules

Were you aware you're allowed to request a future or previous module (out of order)?

Just "Contact Us" and you'll receive the module you request in lieu of your next module.

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

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 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 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 Referability Dashboard

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

Read more...

ADVISOR PACT™

Mark Mckenna Little ▼

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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

https://advisorpact.com/contact-us

Make

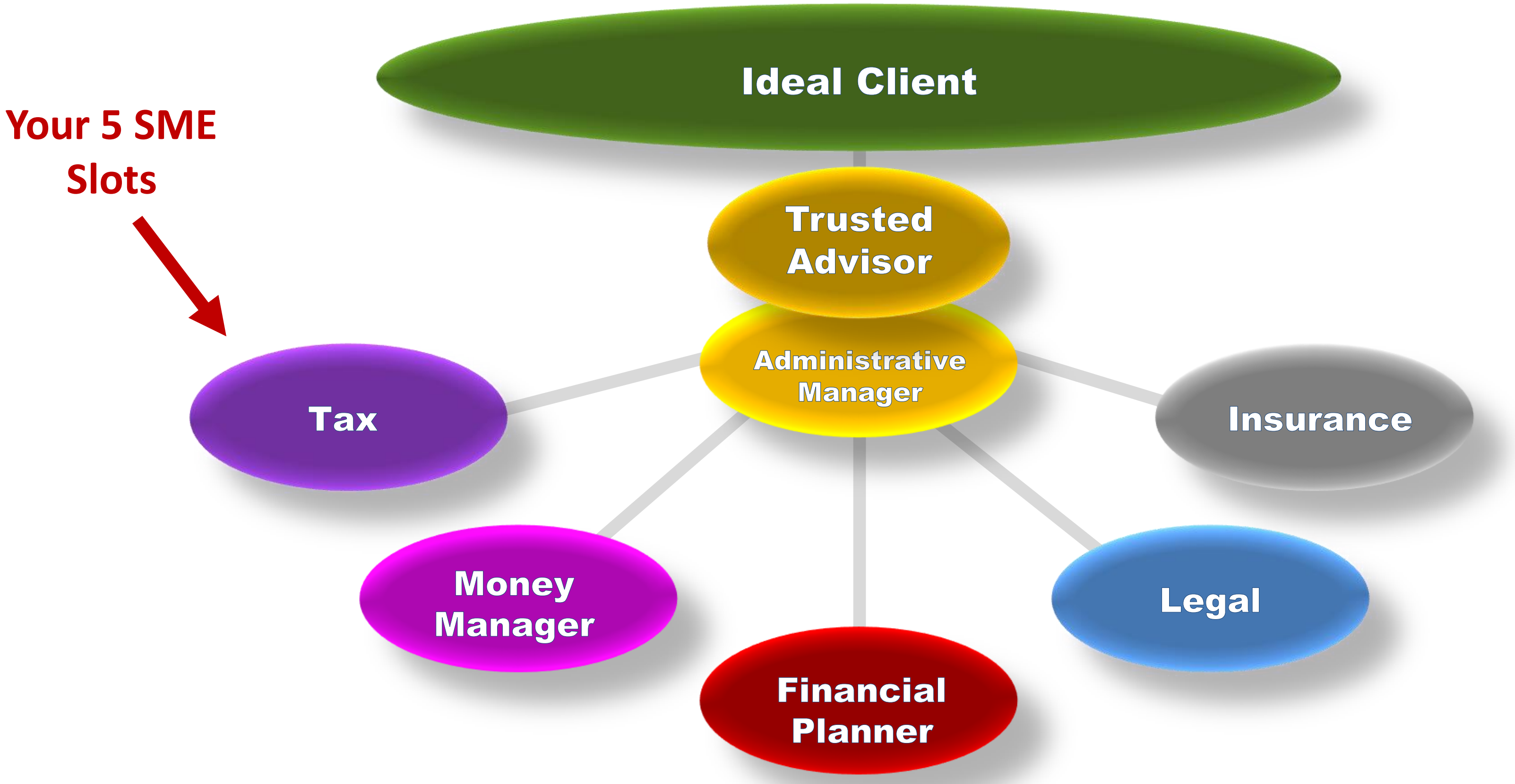
The Team Goal

The focal point of your leadership

Are there times when one person covers off more than one of the 5 subjects?

Would the Trusted advisor be able to fill 1-2 roles?

Our Deliverables Team Structure



Are there times when one person covers off more than one of the 5 subjects?

One Subject Matter Expert (SME) on a team can be responsible for up to two narrow fields of finance, but not three.

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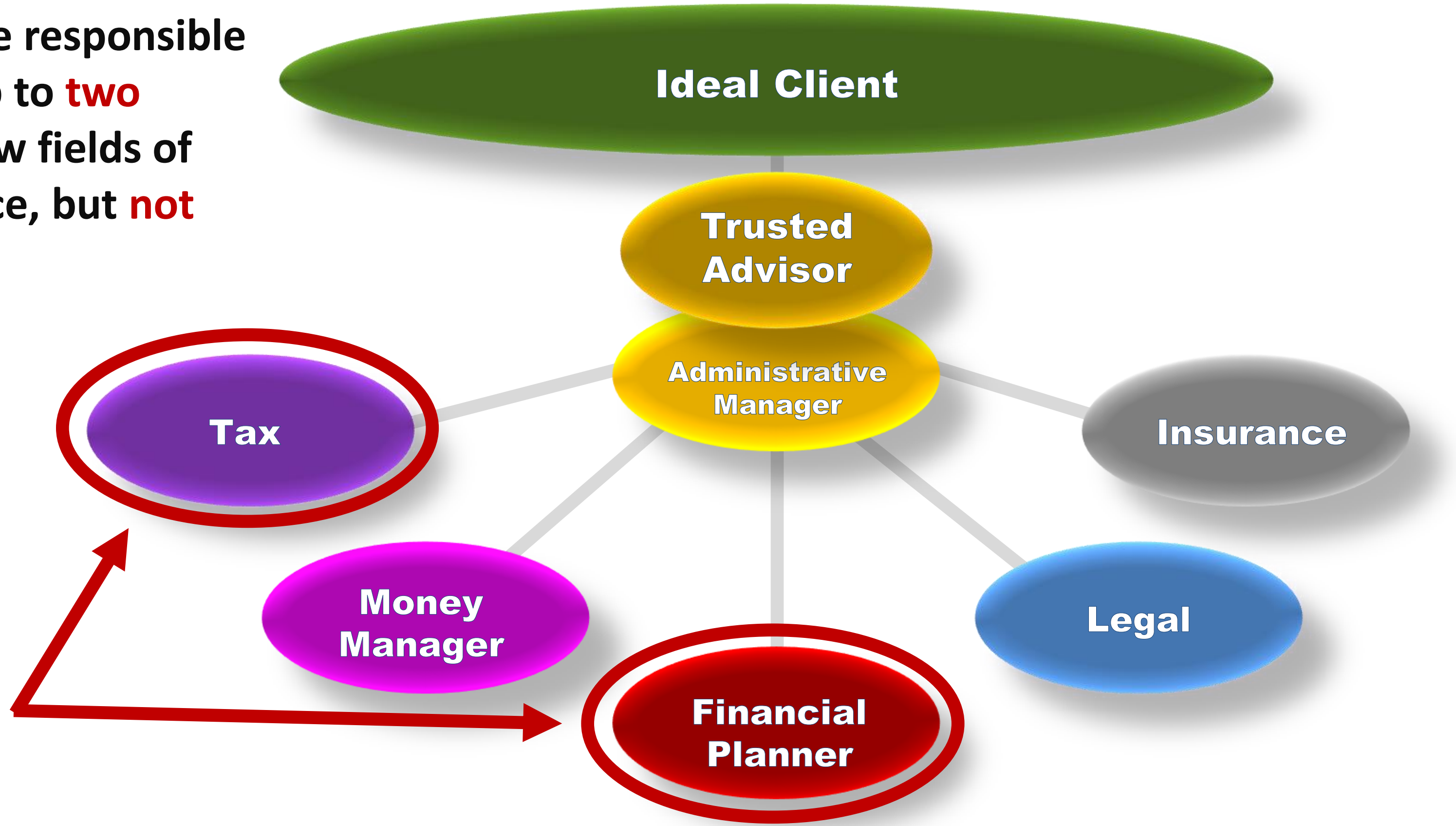

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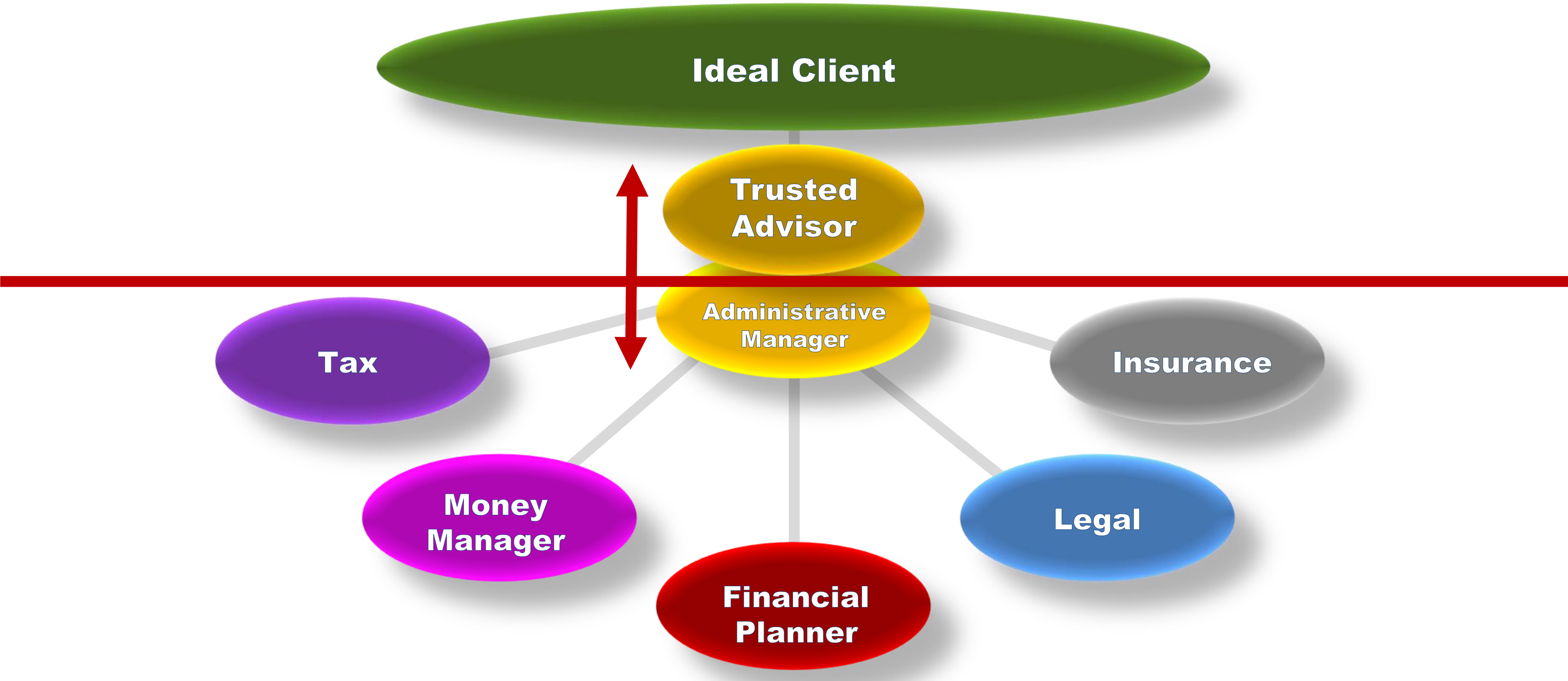

Say I go thru The Initial Client Interview™ (FRM) with a potential client, make the offer and they decline.

IF they call back a week, month or year later and have reconsidered (maybe some life event happened), would do you suggest I re-invite them OR is it “one and done”.

If they initially decide NOT to join my Ideal community of clients, then they won’t be invited to join. Ever.

Depends on your Business Goals

Scarcity

Non-manipulative

Equitable

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.