



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

November 13, 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**
- ✓ Turn off your **Phone**
- ✓ Multi-tasking **isn't** a thing (focus is the thing)

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 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 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

Register for the webinar at
www.AdvisorPACTpledge.com

Welcome New Members to
The Trusted Advisor Toolkit
Fast Track

The 1st Fifteen Modules

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. Read more...
	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. 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 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...

The Trusted Advisor Toolkit Fast Track

November 13, 2018

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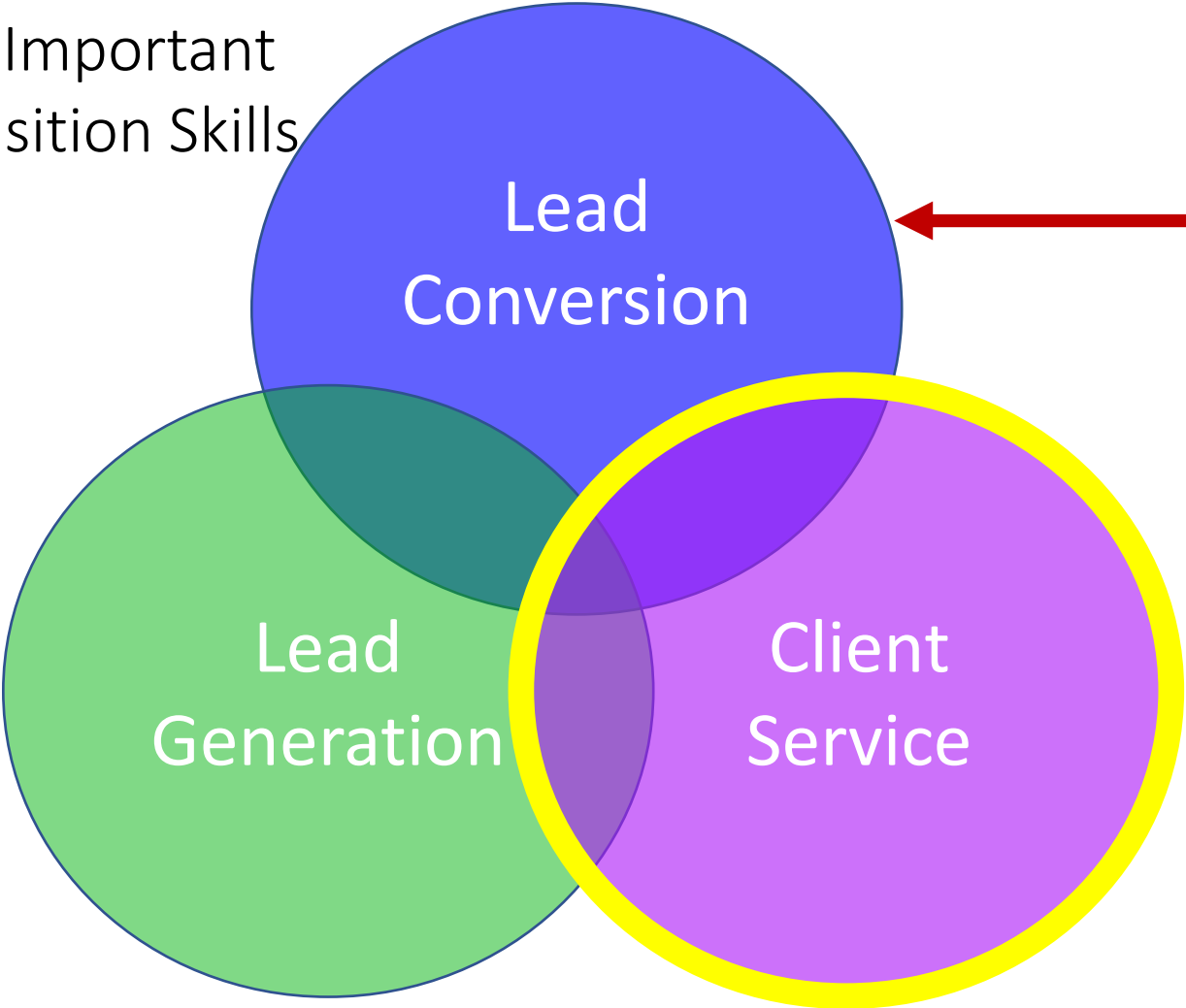
ADVISOR | PACT



**Say I go thru a clients FRM,
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 Mark 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.**

The 3 Most Important
Client Acquisition Skills



For me...

ICP is my filter: “very **few** potential clients fit my ICP”

Accepting Finite Number:
After I acquire 100 Ideal Clients... I’m **closing** my doors to new clients

My Ideal Client Profile Strategy

The client we serve best has these qualities...

- ✓ A financial delegator
- ✓ Has acquired more than \$2.5MM (excluding residence)
- ✓ ...
- ✓ ...
- ✓ ...
- ✓ ...
- ✓ ...
- ✓ ...

Fair Warning

Sent monthly update of
my Ideal Client **Count**

Wanted to make it known
the **pace** that the window
was closing

Monthly Client Update:

Ideal Clients in October: 26

I'm welcoming 2 new Ideal Clients

Ideal Clients in November: 28

Once we have acquired 100 Clients we'll be
closing our doors to new business.



If a client refers someone to me, they come in to have their FRM completed (after they received Bill' book and had the initial phone call etc..), but when invited to join the community they decline (for whatever reason), do you suggest that I call the client who gave the referral, thank them and tell them that their friend (I am not sure how to word this) has decided NOT to join the community? How do you handle a situation like this?

Proper Client Protocol

Following-up
with a *client*
who provides a referral



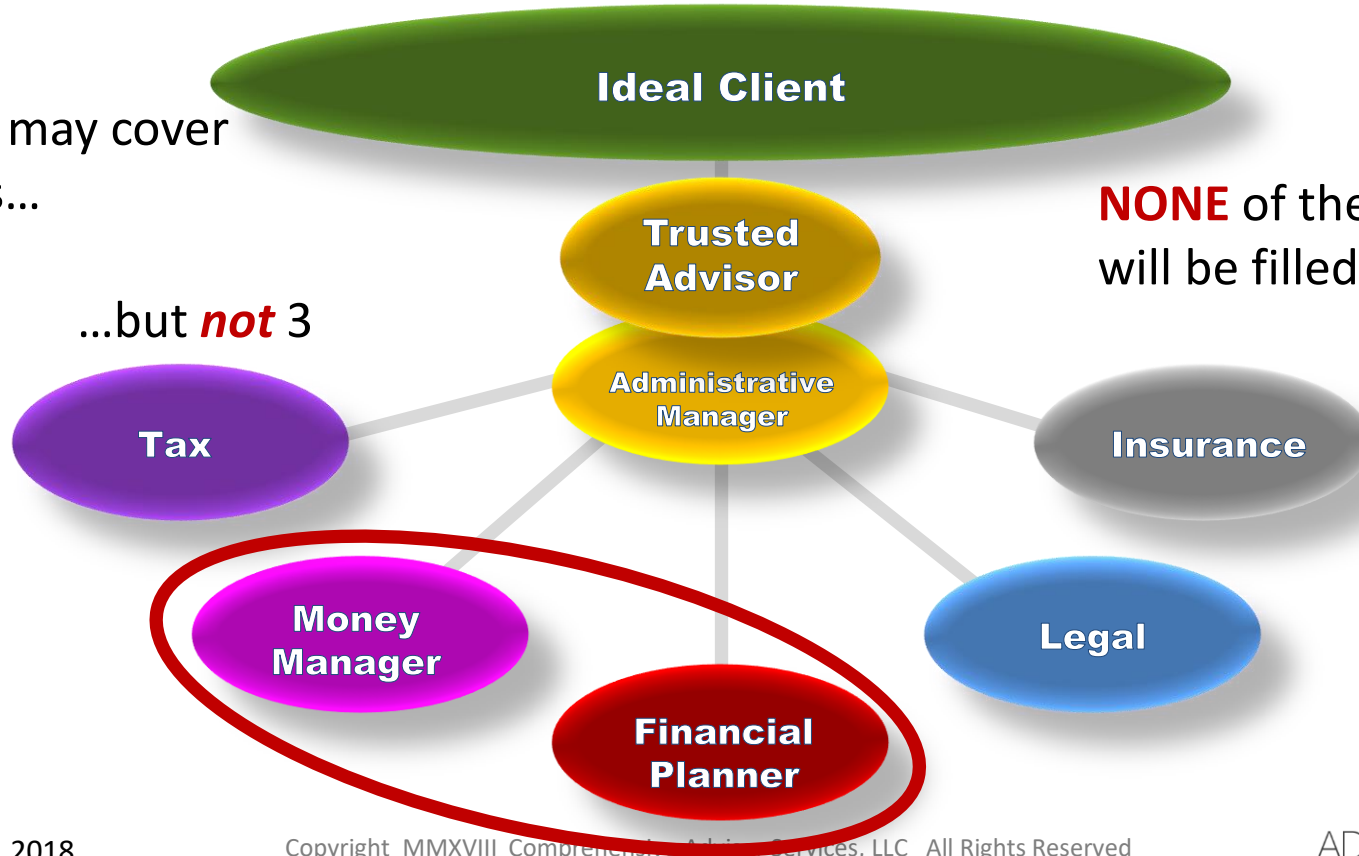
Are there times where one person covers off more than one of the 5 subjects?

Our Deliverables Team Structure

1 SME may cover
2 roles...

...but **not** 3

NONE of the SME roles
will be filled by the TA





I am in discussions with who I believe will be my Legal SME. He charges \$240/hr. for his normal scope of work.

I thought I would ask your thoughts on a good structure of a flat fee model based on what he currently charges so that it is a profitable endeavor for him (with the ultimate goal of 53 clients from me).

Any ideas on how to structure the deal based off your experience?

The 1st Fifteen Modules

The Monthly Project™



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[Read more...](#)



Vision and Goals | For Financial Advisors

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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

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Hiring an Extraordinary Administrative Manager

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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

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[Read more...](#)



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[Read more...](#)



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Setting Your Compensation

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ADVISOR PACT

The 12-Step Deliverables Team Recruitment Process™

In this module we recommend...

- ✓ Seek SMEs who can demonstrate their skill at **impressing** Ideal Clients (experiencing lots of client referrals)
- ✓ Have 2+ administrative **support** people
- ✓ Attempt to negotiate a **flat** fee whenever possible (at the end)

The 12-Step Deliverables Team Recruitment Process™

Negotiable Flat Fee: 8 hours per client per year (the first year)

- ✓ 6 hours of the SME's time (\$240/hour)
- ✓ 2 hours billed at their paralegal's rate (EX: \$40/hour)

The 12-Step Deliverables Team Recruitment Process™

(one of the first 15 modules you'll be receiving in this program)

Step 10 of 12: The Deal Structure Meeting™

Negotiate a Flat Fee: 8 hours per client per year

(Their time budget for the first year not including the cost of creating the initial plan)

- ✓ 6 hours of the SME's time (\$240/hour): **$240 \times 6 = \$1,440$**
- ✓ 2 hours billed at their paralegal's rate (EX: \$40/hour) = **\$80**
- ✓ Annual Flat Fee: $\$1,440 + 80 =$ **$\$1,520$ per client per year**
- ✓ Potential Contract: $\$1,520 \times 53$ Ideal Clients = **$\$80,560$**



There were at least 5 questions submitted live during this webinar (not listed here).

You'll need to listen to the webinar replay for those.



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.