ADVISOR | PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT Monthly Session™

December 18, 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

PROTECTION

ATTENTION

COORDINATION

TRANSPARENCY

Pledge

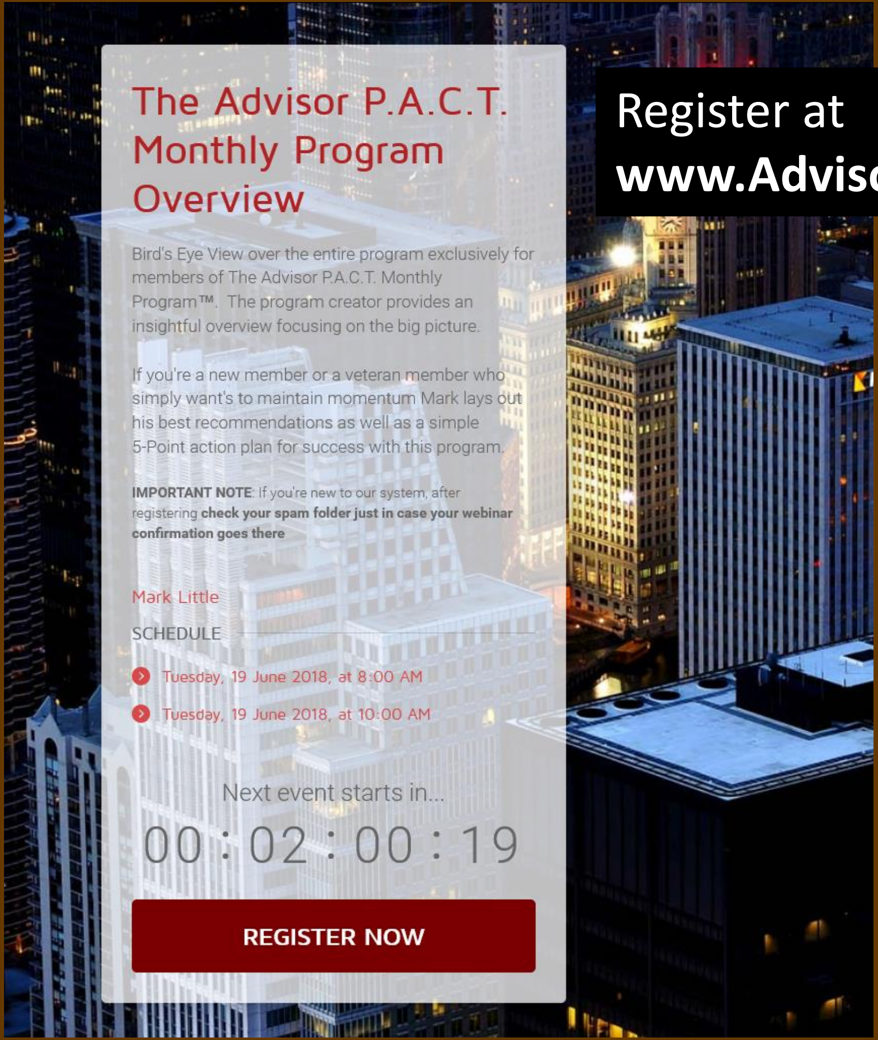
To every Ideal Client

Program Overview Webinar

to accelerate your results with

The Advisor P.A.C.T.

Monthly Program™



Register at
www.AdvisorPACTpledge.com

Register for the webinar at

www.AdvisorPACTpledge.com

Welcome New Members to

The Trusted Advisor Toolkit

Fast Track

December 18, 2018

ADVISOR PACT

The 1st Fifteen Modules

The Trusted Advisor Toolkit Fast Track

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.
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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...

December 18, 2018

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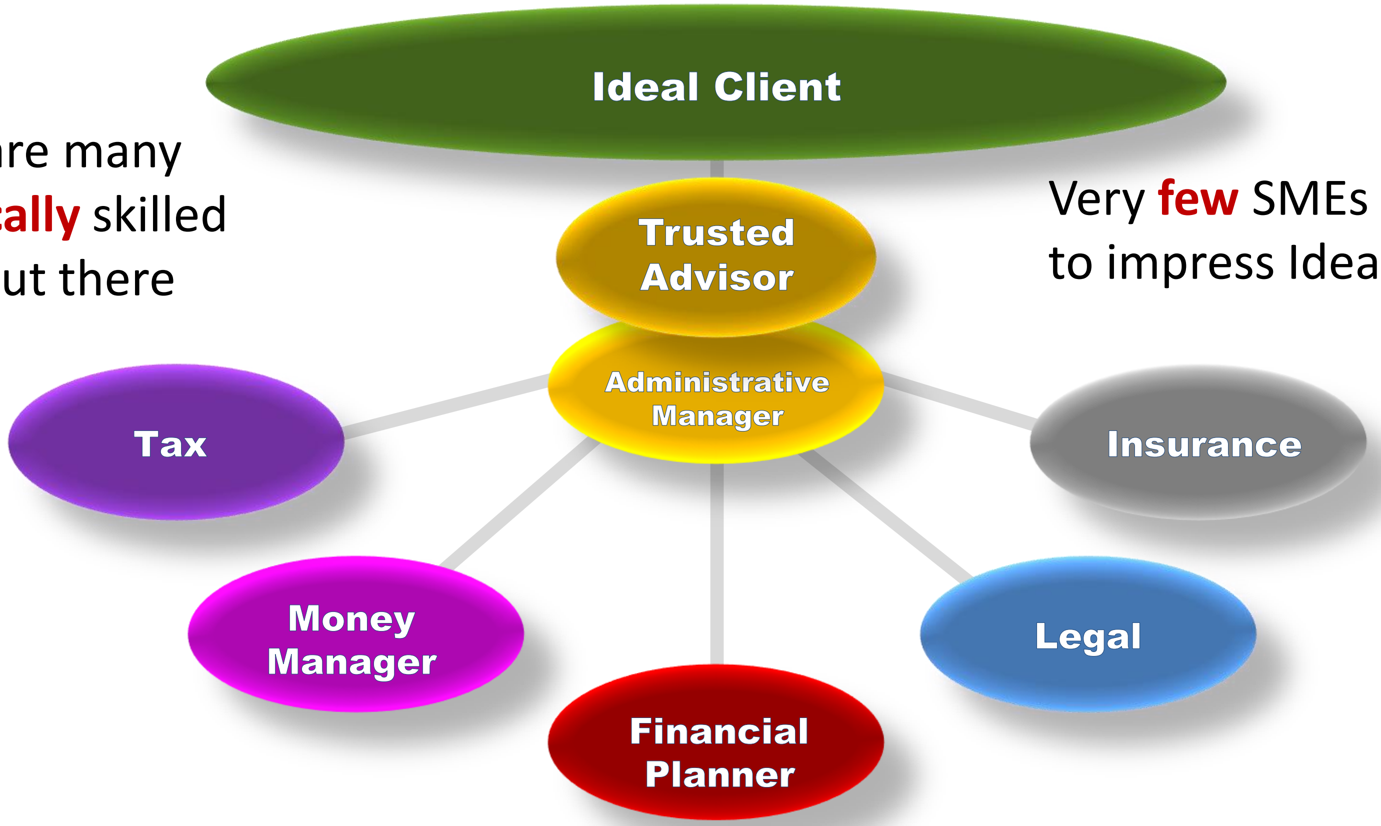
From Last Month’s Q&A Session:

I don't know how you incent the team to work for free. You are asking them to take time to brainstorm for ideas to exceed expectations, without paying them for their time or service.

Our Deliverables Team Structure

There are many **technically** skilled SMEs out there

Very **few** SMEs know how to impress Ideal Clients



How can an outcome be "you'll always be on-track with your goals?"
when some clients set unrealistic goals,
and other clients' goals become unattainable at some point (or after some calamity)

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**

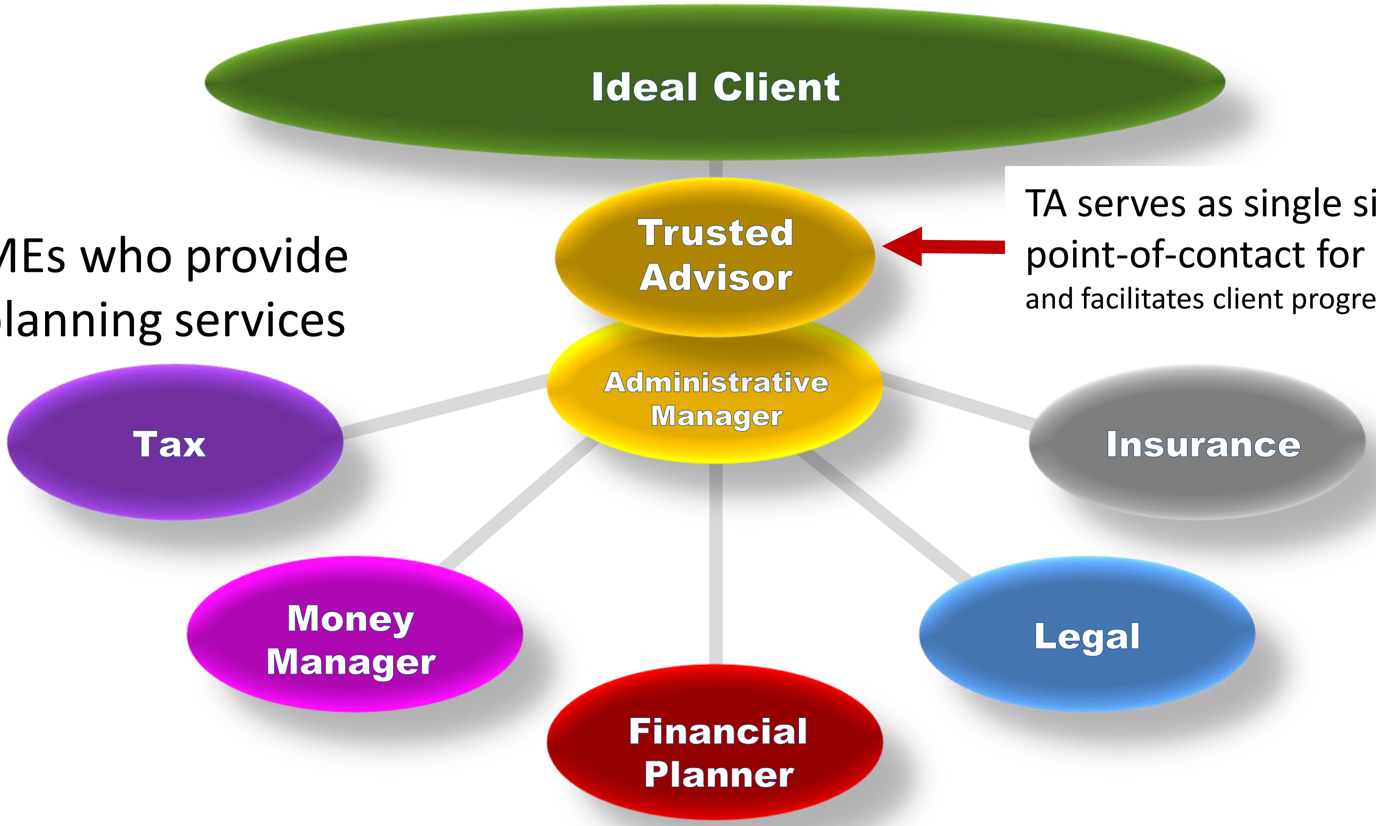
Make better financial decisions

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

Do you position yourself as financial planner in this model?

Our Deliverables Team Structure

5 SMEs who provide
all planning services



TA serves as single simple point-of-contact for Ideal Clients
and facilitates client progress meetings

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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?

The 1st Fifteen Modules

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The Hero's Journey

The Extraordinary Client Experience

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Whenever you have an immediate need, "Contact Us"

You can request to swap out the current course you're working on for another one you need more

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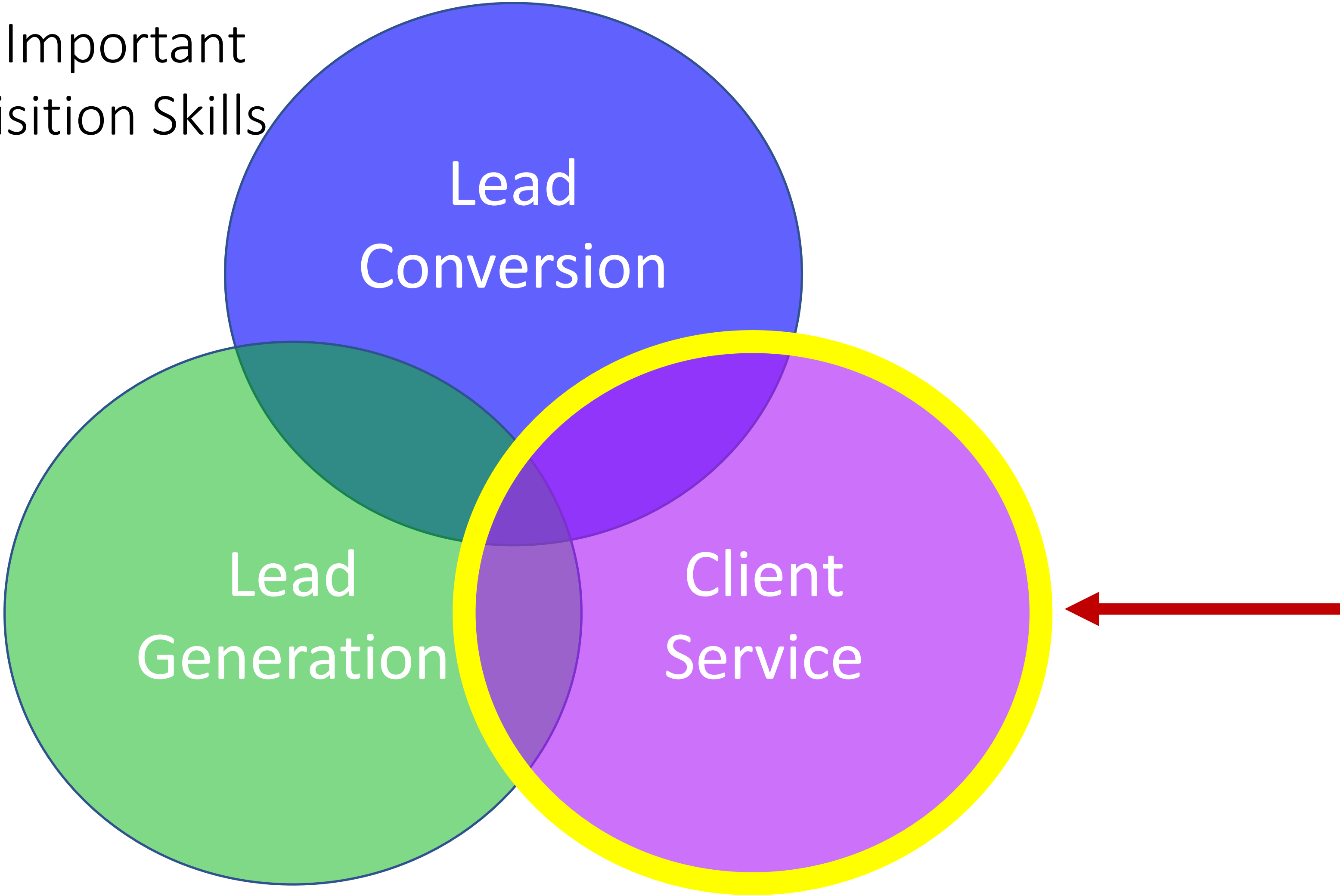
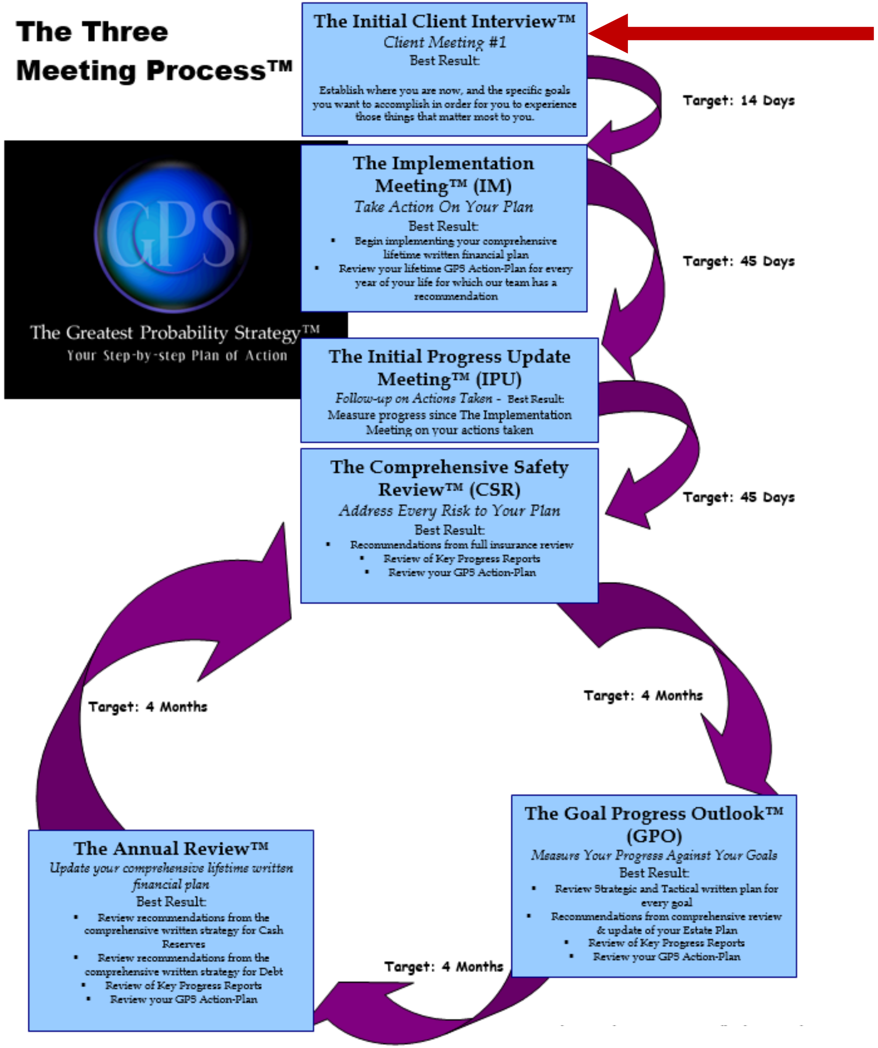
What is The Three Meeting Process™?

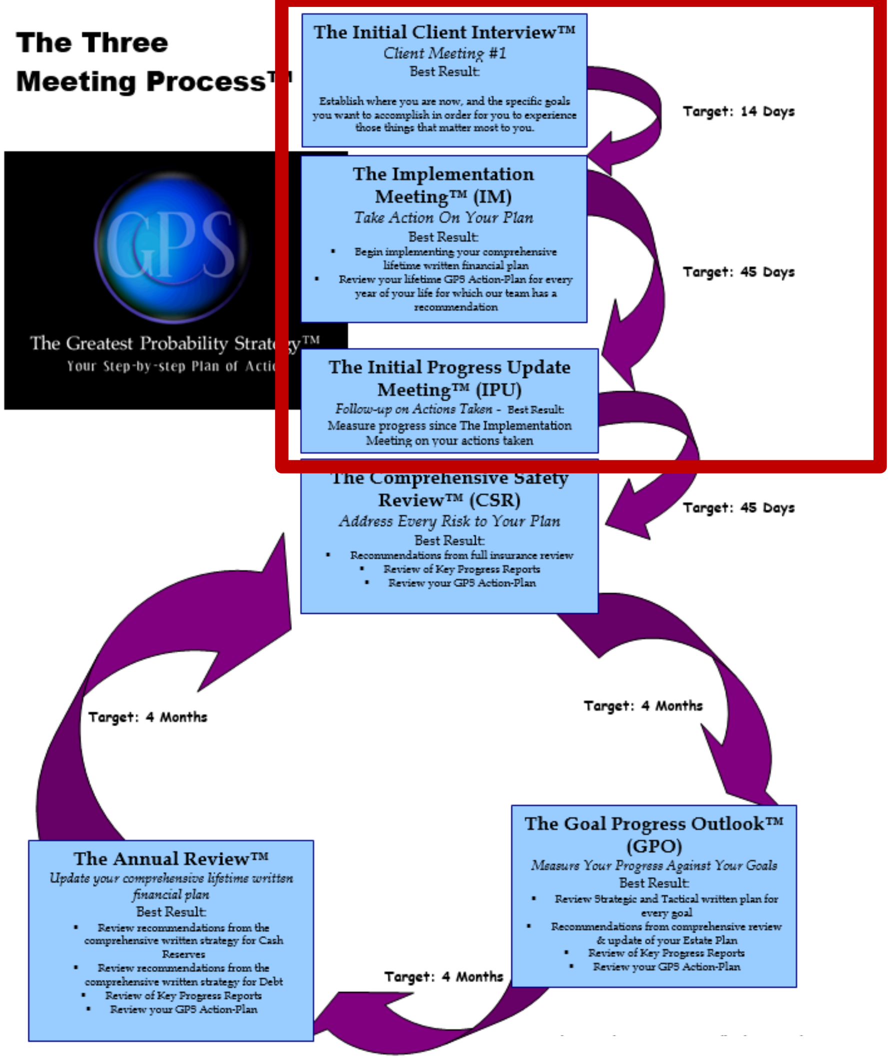
I’ve heard this term, but am unclear on what it is and how it works.

The 3 Most Important
Client Acquisition Skills

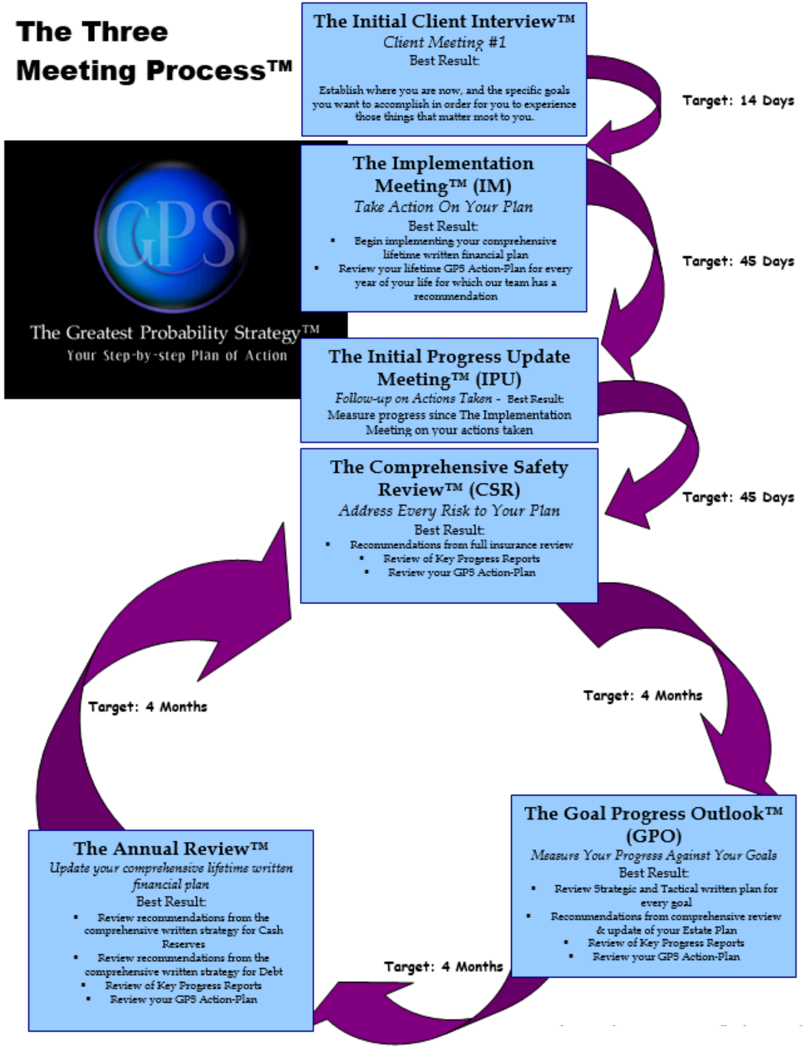




The **Initial Client Interview™** is your Lead Conversion Process



The
One Time
Meetings



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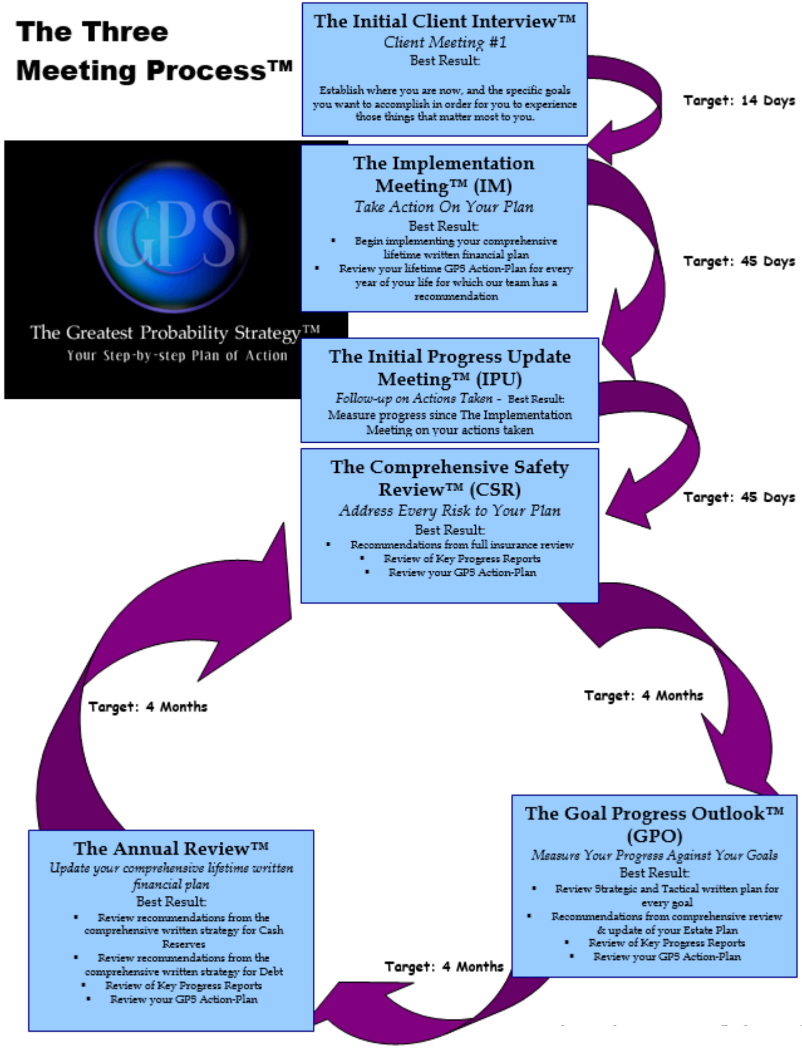

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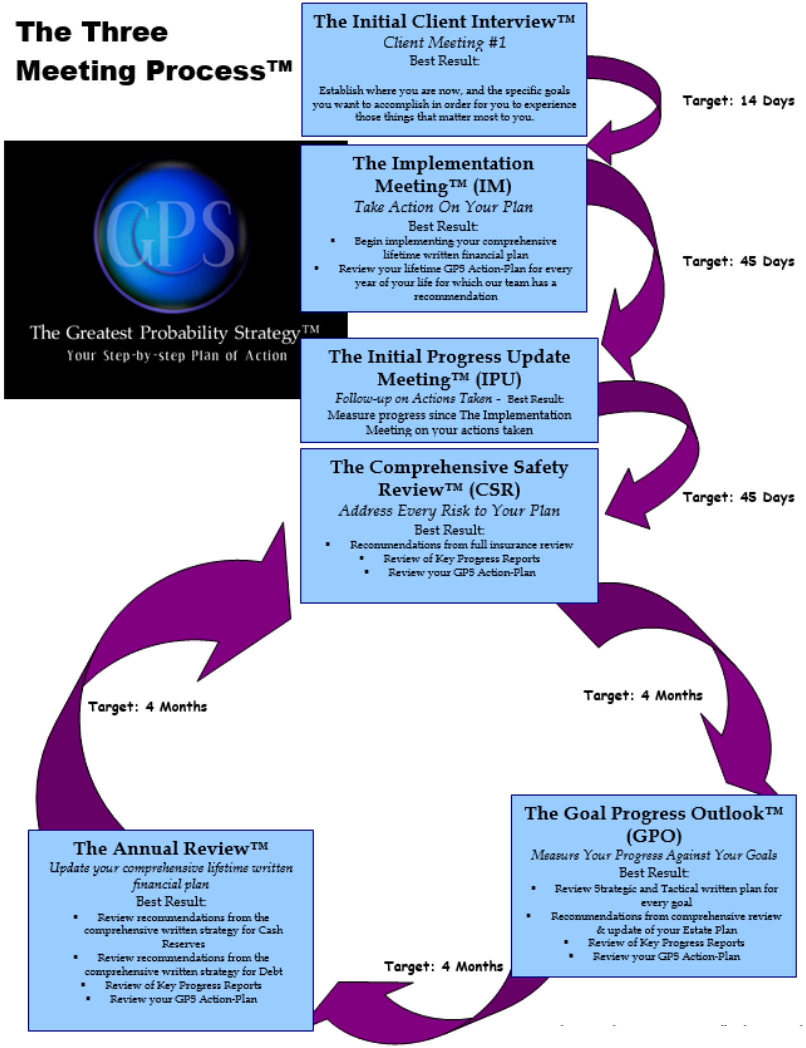

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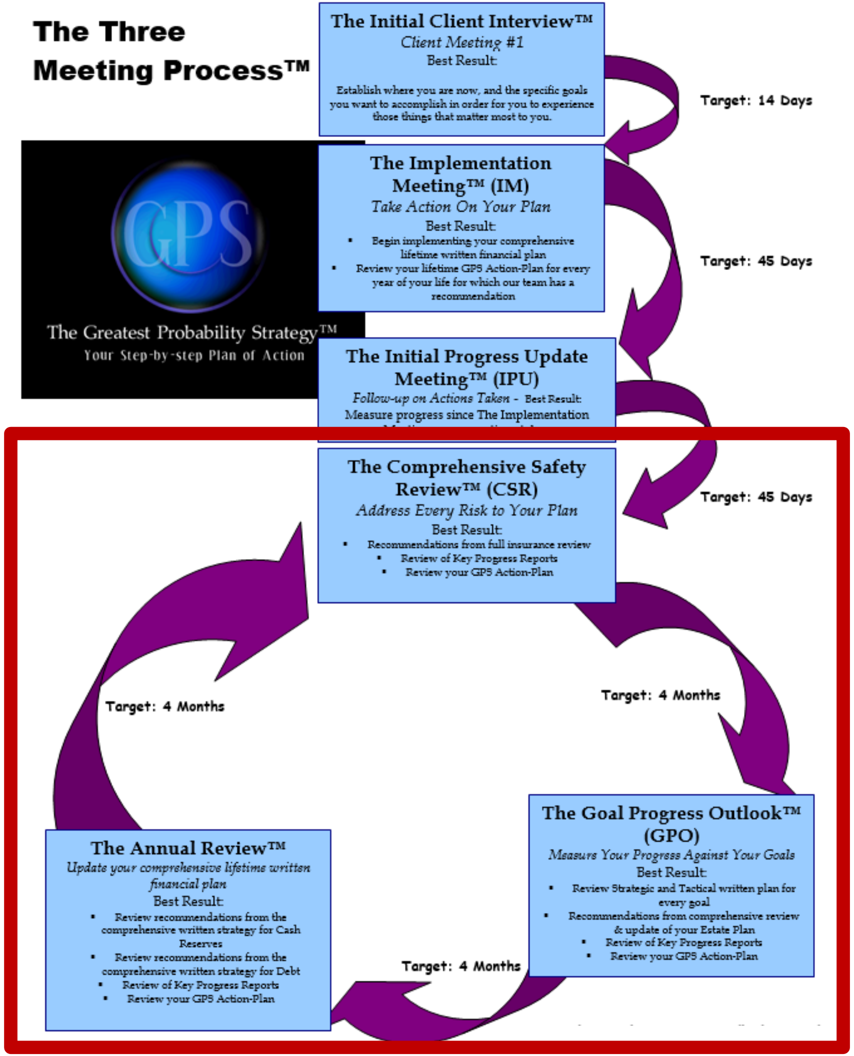
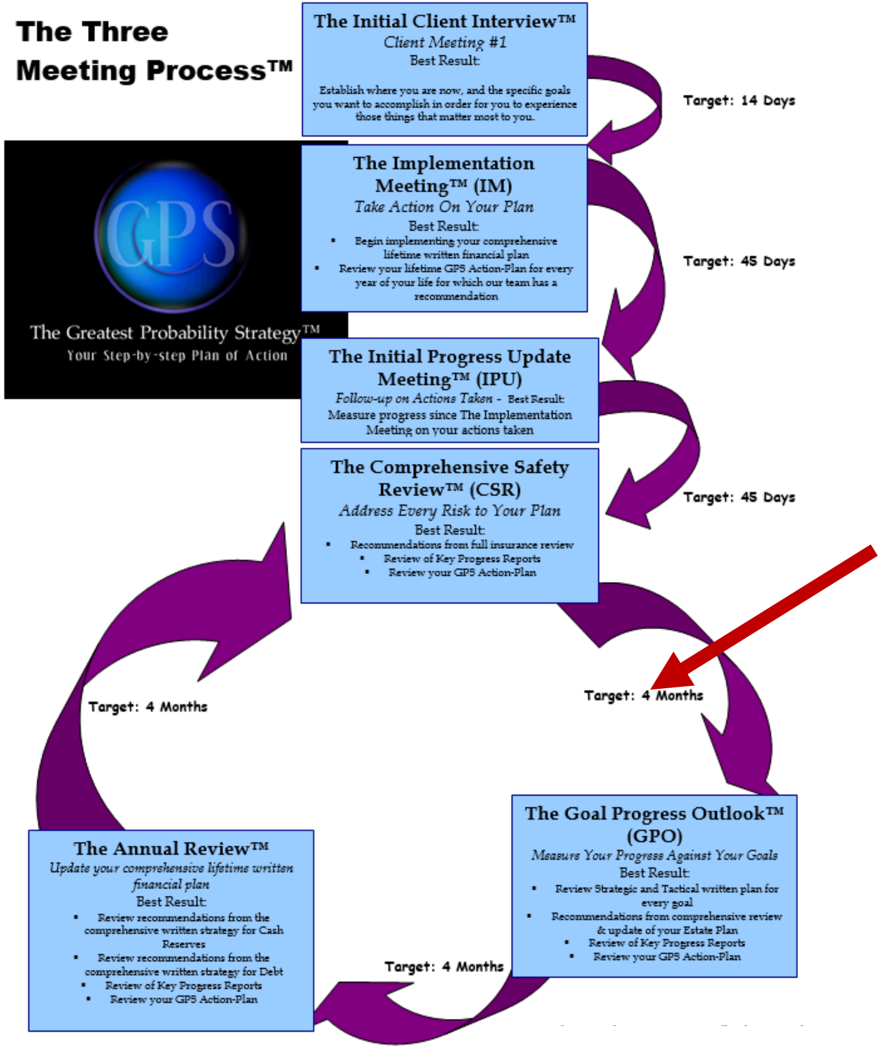
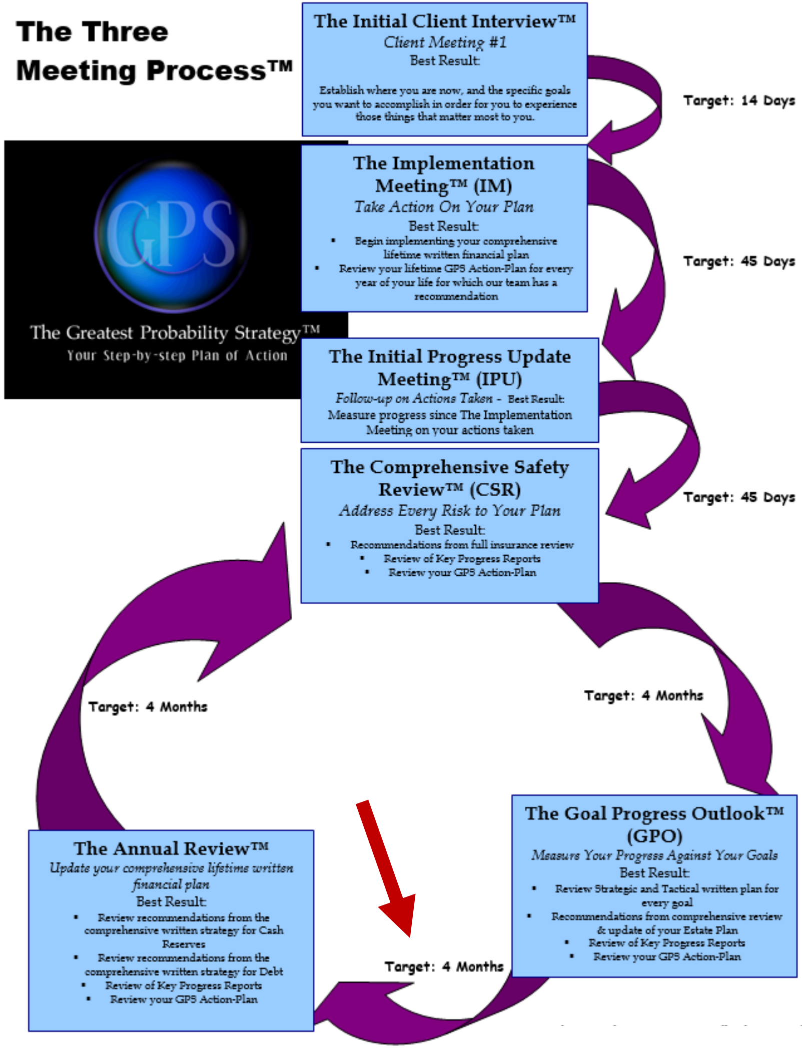


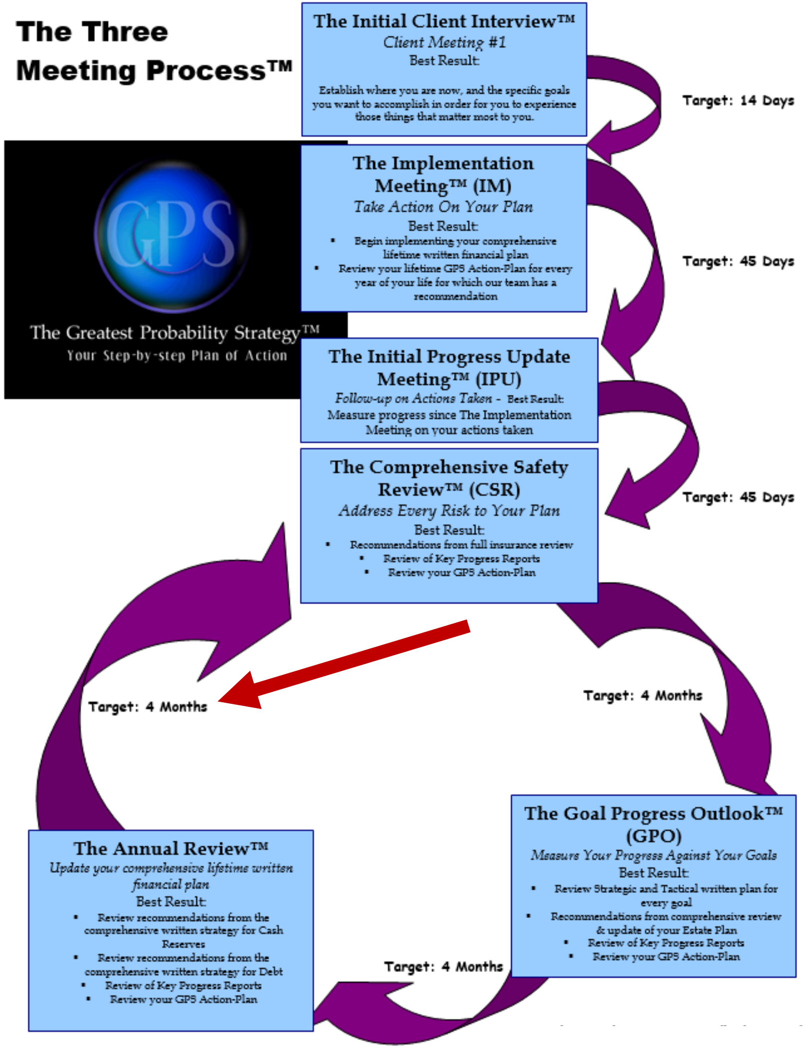
The Annually Recurring Meetings



The Annually Recurring Meetings



The Annually Recurring Meetings



The Annually Recurring Meetings

Do you have an example of a well written Financial Plan?

“Financial Plan”

means different things

to different people

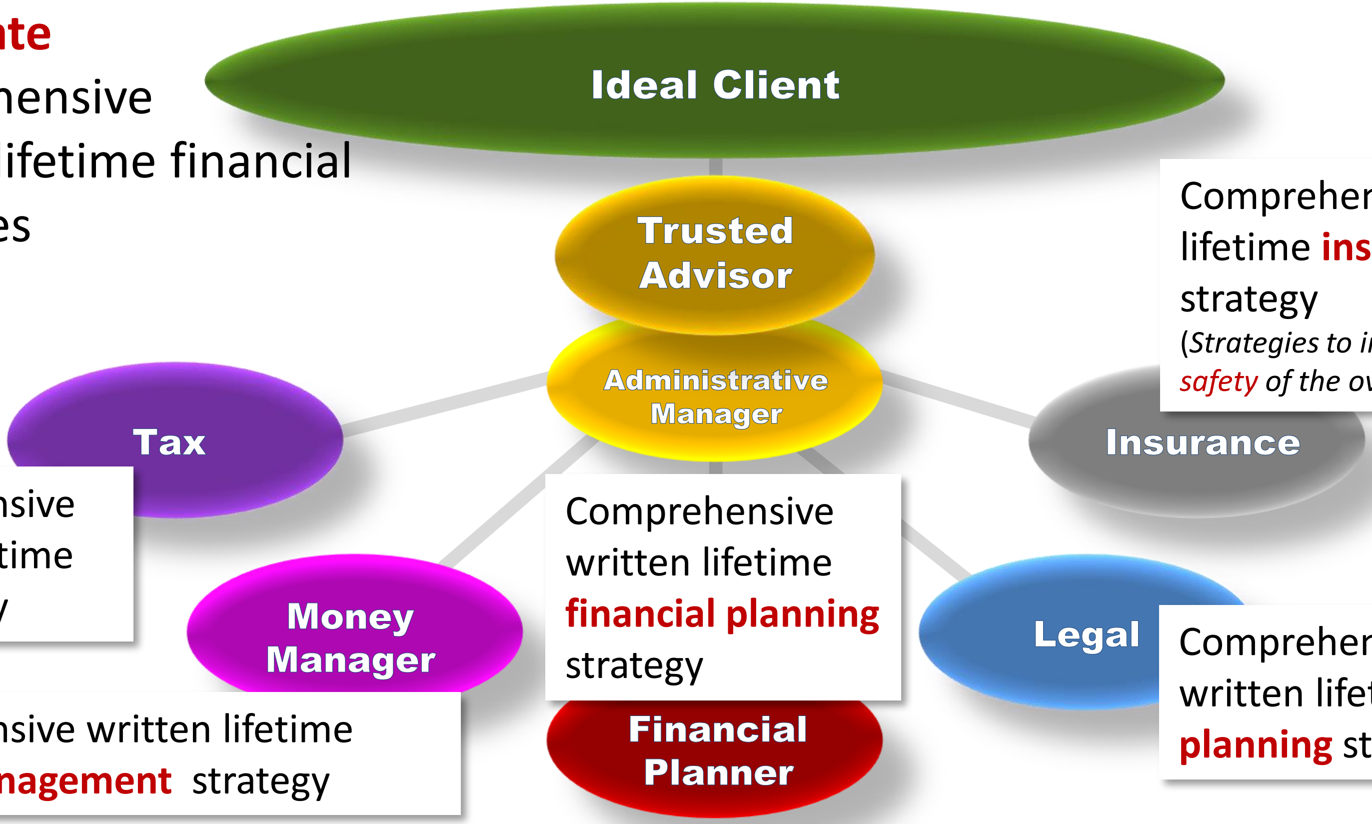
No universally accepted industry standard exists

Instead, in our method, every Ideal Client has a…

Comprehensive written lifetime financial strategy

Our Deliverables Team Structure

5 SMEs create
5 separate
comprehensive
written lifetime financial
strategies



Comprehensive written lifetime **insurance** strategy
(*Strategies to increase the* ***safety*** *of the overarching plan*)

Comprehensive written lifetime **tax** strategy

Comprehensive written lifetime **financial planning** strategy

Comprehensive written lifetime **money management** strategy

Comprehensive written lifetime **estate planning** strategy

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Comprehensive written lifetime financial strategy

(**9 elements** for each overarching plan)

Comprehensive written lifetime **financial planning** strategy

A lifetime capital projection
Year-by-year schedule

A **Cash Reserves** Plan

Cash reserves target amount & strategy to get there and remain there

A **Debt** Plan

Including a debt schedule & timeline

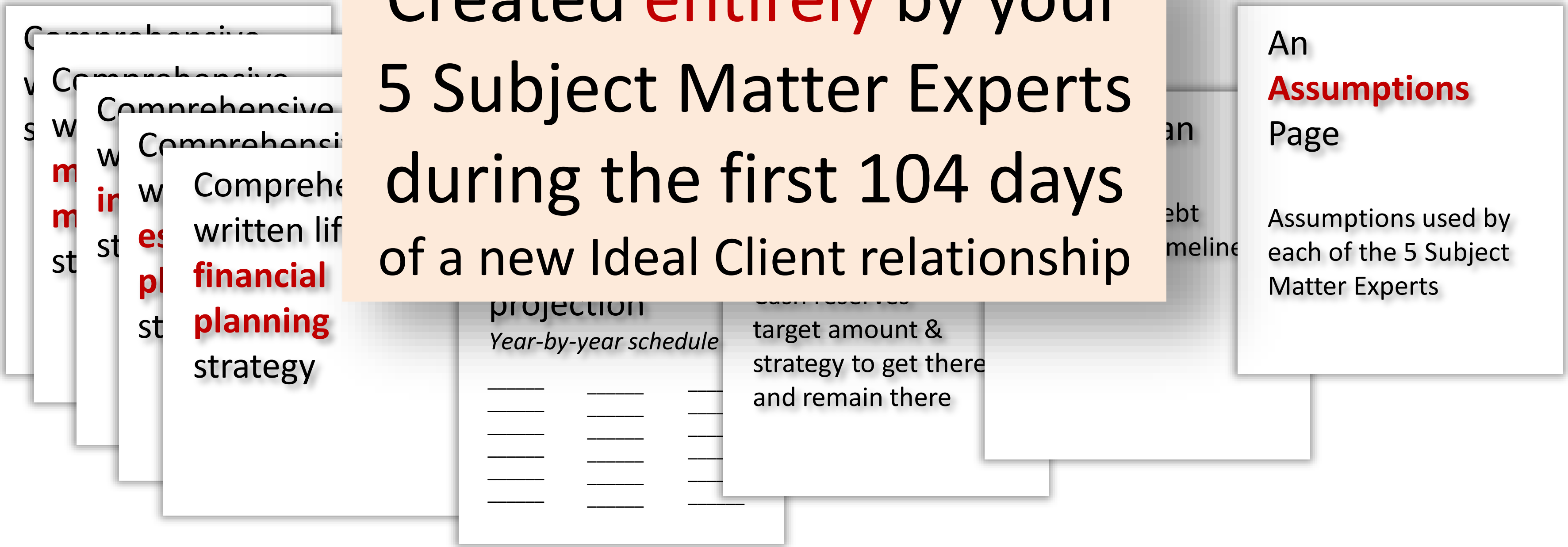
An **Assumptions** Page

Assumptions used by each of the 5 Subject Matter Experts

Comprehensive written lifetime financial strategy

(9 elements for each overarching plan)

Created entirely by your 5 Subject Matter Experts during the first 104 days of a new Ideal Client relationship



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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.