



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

April 16, 2019

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

To have the best experience today...

- ✓ Close your **email** program
- ✓ Close all **browsers**
- ✓ Turn off your **Phone**
- ✓ Multi-tasking **isn't** a thing (focus is the thing)

Have You Considered...

Something discussed today will be a **game-changer for your business?
...which could be easily missed **if you're not focused.****

Your
ADVISOR
PACT
TRANSPARENCY
PROTECTION
ATTENTION
COORDINATION
Pledge

To every Ideal Client

What did you do differently?



At the end of The Financial Road Map® interview, when you realize this is a person that may potentially be an ideal client, do you do something different than Bill Bacharach at some point in Conversation #7?

Are you still using his script after “now, let me tell you exactly what you’ll get....”? If not, are you just pulling out your ideal client profile and walking through each point and having a discussion with them first?

I’m trying to fully understand in detail how to mesh Bill Bacharach and your method at this point in this interview meeting. Thanks in advance for your thoughts.

Financial Road Map[®]

for Living Life on Purpose

"There are those who travel and those who are going somewhere. They are different, and yet they are the same. Successful people have this over their rivals: they know where they are going."

Mark Caine

"What's Important to You?"



Name: LYNN

Name: TED

Where I Am Today			
Cash Reserves		Growth/Income Assets	
Now	Be	Now	Be
361,620		26,937,810	
Debt		Insurance	
Now	Be	Now	Be
1,664,550			

See Insurance worksheet on back of Financial Road Map[®]

Personal Goal Milestone

Financial Independence
\$100,000/year (net)
Jan 1, 2015

Happy
Relaxed

Personal Goal Milestone

Help Family Fund
100,000/year
Jan 1, 2015

Honored
Relieved

Personal Goal Milestone

Fun w/ grandkids x3
500,000
Aug 15, 2017

Fun
a blast
excited

Personal Goal Milestone

Dream Jamaica Pool
135,000
Nov 21, 2015

Bubbly
Relaxed

Financial Road Map® for Living Life on Purpose

"There are those who travel and those who are going somewhere. They are different, and yet they are the same. Successful people have this over their rivals: they know where they are going."
Mark Caine

"What's Important to You?"

Full + complete	Purpose of life
Happiness	Feel complete
Live how I want	Living in a great way
Security	Satisfaction
Freedom	Freedom to do what I want
Pleasure	Meet our needs
Buy what I want + need	

Name: LYNN

Name: TED

Personal Goal Milestone

Financial Independence
\$100,000/year (net)
Jan 1, 2015
Happy
Relaxed

Personal Goal Milestone

Help Family Fund
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Personal Goal Milestone

Europe w/grandkids vs
500,000
Aug 15, 2017
Fun
a blast
excited

Personal Goal Milestone

Dream Vacation + Total
135,000
Nov 21, 2015
Happily
Relaxed

Where I Am Today

Cash Reserves		Growth/Income Assets	
Now	Be	Now	Be
361,620		26,937,810	
Debt		Insurance	
Now	Be	Now	Be
1,664,550			

See Insurance worksheet on back of Financial Road Map

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Our Ideal Client

The Client we serve the best has the following qualities:

- THEY ARE FINANCIAL DELEGATORS:** Our community of clients appreciate, and are happy to follow, the advice of a team of financial experts coordinated by a single Trusted Advisor.
- THEY ARE PASSIONATE ABOUT GOALS:** Our clients realize that achieving their goals requires both money and planning. Our Ideal Clients appreciate our commitment to pay close attention to all the financial details and proactively make prompt recommendations to get back on track whenever inevitable course corrections are required.
- THEY ENJOY SIMPLICITY:** Our clients enjoy the simplicity, freedom, and peace of mind that comes from having all their financial assets under the watchful eye of a single, Trusted Advisor. An advisor who provides oversight, coordinating all personal financial affairs. A single simple point-of-contact to chase down all the financial issues, hold everyone accountable, and ensure every recommendation from the team is perfectly aligned with the overarching strategy.
- THEY VALUE OUR WORK TOGETHER:** Our clients appreciate advice and guidance. Due to the high level of client interaction and attention, our services make sense for families who have accumulated more \$5,000,000, not including the value of their home
- THEY FOCUS ON WHAT'S IMPORTANT:** Our clients delegate financial matters so they can focus their valuable time and energy on the things in their life that are most important to them. Clients who appreciate an advisor who views their role as to protect the financial assets, and the financial strategy, allowing clients to focus upon the things which matter most in life.
- THEY APPRECIATE THE CANDID TRUTH:** Our clients want to hear the truth from us regarding their financial situation...no matter what. Clients who rely upon complete transparency from their advisor.

Once we have a community of one hundred clients who meet this profile we will not be accepting any new clients.

The Ideal Client Profile



Our Ideal Client

The Client we serve the best has the following qualities:

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How Do I Deliver Truly Comprehensive Financial Services™?



We're filling Subject Matter Expert Vacancies and creating our Deliverables Checkpoints™ to fulfill Truly Comprehensive Financial Services™. I'm pleased with our progress.

Question... But how do we ***deliver*** all this.

Would quarterly client meetings work best?

What I do differently is so simple...

Lead Conversion

- The Financial Road Map®
- Clients bring all documents to the initial meeting
- I could establish in less than 1 hour whether potential client meets my Ideal Client Profile
- Meeting is valuable no matter what happens

Lead Generation

- I'm out of the office most of the time
- I got the people I know to introduce me to people I don't know (Marketing 101 Make a List Project)
- I became active in my community at a very high level (Fishing in The Right Ponds)

5 Skilled Subject Matter Experts

- Subject Matter Experts serve my Ideal Clients
 1. Financial Planning Subject Matter Expert
 2. Tax Planning Subject Matter Expert
 3. Estate Planning Subject Matter Expert
 4. Money Management Subject Matter Expert
 5. Insurance Subject Matter Expert
- They were paid only as I acquired each new Ideal Client

Client Service

- Truly Comprehensive Financial Services™
- Hold team accountable to consistently exceeding Ideal Clients' expectations
- Hold team accountable to being "indispensable" to each Ideal Client.
- Measure success by consistently increasing The Annual Referral Rate™ (TARR)

The Three Meeting Process™

- Meet with every Ideal Client at least once every 4 months
- Schedule all meetings 12-months in advance
- The Ten Client Deliverables™
- Annual Checklist: 142 Deliverables Checkpoints™

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The Monthly Session™

Advisor PACT Live Q & A Session Webinars And Replays

Register (Once) For The Monthly Advisor PACT Session™ Webinars

To register for The Monthly Advisor PACT Session™ webinar series, **click on any one of the upcoming events** below and then look **for the webinar registration link**. You only need to register once.

Upcoming Advisor PACT Monthly™ Sessions

These **LIVE sessions** are normally scheduled for the morning of the **3rd Tuesday of each month (in US-Pacific time)**

The Series Registration link can be found in any upcoming Event page.

Title	Description	Start Date
Monthly Q & A Session (April 2019)	The Monthly Session™ is a live discussion with Mark McKenna Little or a member of his senior staff to respond to the questions or issues you feel are standing in your way, or will accelerate your results.	Apr 16, 2019 08:00 AM US-Pacific Converter
Monthly Q & A Session (May 2019)	The Monthly Session™ is a live discussion with Mark McKenna Little or a member of his senior staff to respond to the questions or issues you feel are standing in your way, or will accelerate your results.	May 21, 2019 08:00 AM US-Pacific Converter
Monthly Q & A Session (June 2019)	The Monthly Session™ is a live discussion with Mark McKenna Little or a member of his senior staff to respond to the questions or issues you feel are standing in your way, or will accelerate your results.	Jun 18, 2019 08:00 AM US-Pacific Converter
Monthly Q & A Session (July 2019)	The Monthly Session™ is a live discussion with Mark McKenna Little or a member of his senior staff to respond to the questions or issues you feel are standing in your way, or will accelerate your results.	Jul 16, 2019 08:00 AM US-Pacific Converter

Replays Are Listed in The Right-hand Sidebar (Past Sessions) ⇔

Replays are typically posted within 24 hours.

Past Sessions

[Acquire Ideal Clients Faster: How to be different and better!](#)
Mar 19, 2019

[The Ten Pivotal Questions™](#)
Feb 19, 2019

[The Interaction Log™ Process Improves Team Communication](#)
Jan 15, 2019

[The Three Meeting Process™ & Overarching Plan Creation](#)
Dec 18, 2018

[Art of Negotiating a Flat Fee With SMEs](#)
Nov 13, 2018

[Filling Team Vacancies - Can One Team Member Fill Multiple Team Roles?](#)
Oct 16, 2018

[The Team Goal - The Key To Consistently Increasing Client Referrals](#)
Sep 18, 2018

[Exceed Your Ideal Clients' Expectations at Every Interaction](#)
Aug 21, 2018

[More...](#)

[Manage portals](#)

What I do differently is so simple...

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5 Skilled Subject Matter Experts

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The Three Meeting Process™

- Meet with every Ideal Client at least once every 4 months
- Schedule all meetings 12-months in advance
- The Ten Client Deliverables™
- Annual Checklist: 142 Deliverables Checkpoints™

The Three Meeting Process™

Is the **delivery system** for Truly Comprehensive Financial Services™

- ✓ ***Is designed for Ideal Clients only*** (Non-ideal Clients must have a **substantially reduced level** of service to create an incentive for Ideal Clients)
- ✓ ***Has been tested thoroughly*** with successful affluent clients
 - ✓ Have at least 3 client progress meetings scheduled for every Ideal Client ***at all times.***
 - ✓ Allows you to spread your team's efforts more evenly across the year
 - ✓ No single month has **any more meetings** than any other month
 - ✓ No single month has **any more meeting types** than any other month
- ✓ ***Allows you to meet with every Ideal Client at least once every 4-months***
(routine but not too many or too few meetings per year)

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

Target: 45 Days

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: 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

Target: 4 Months

The Annual Review™ *Update your comprehensive lifetime written financial plan* 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 Three Meeting Process™



1

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

2

The Implementation Meeting™ (IM)

Take Action On Your Plan
Best Result:

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Target: 45 Days

3

The Initial Progress Update Meeting™ (IPU)

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

Target: 45 Days

4

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: 4 Months

Target: 4 Months

5

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

Target: 4 Months

6

The Annual Review™

Update your comprehensive lifetime written financial plan
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
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The 3 *One Time Meetings* for your team to create the overarching plan

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
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Target: 45 Days

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

Target: 45 Days

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: 4 Months

Target: 4 Months

The Annual Review™

Update your comprehensive lifetime written financial plan
Best Result:

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 - 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:

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- Recommendations from comprehensive review & update of your Estate Plan
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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

Target: 45 Days ★

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: 4 Months

Target: 4 Months

The Annual Review™
Update your comprehensive lifetime written financial plan
Best Result:
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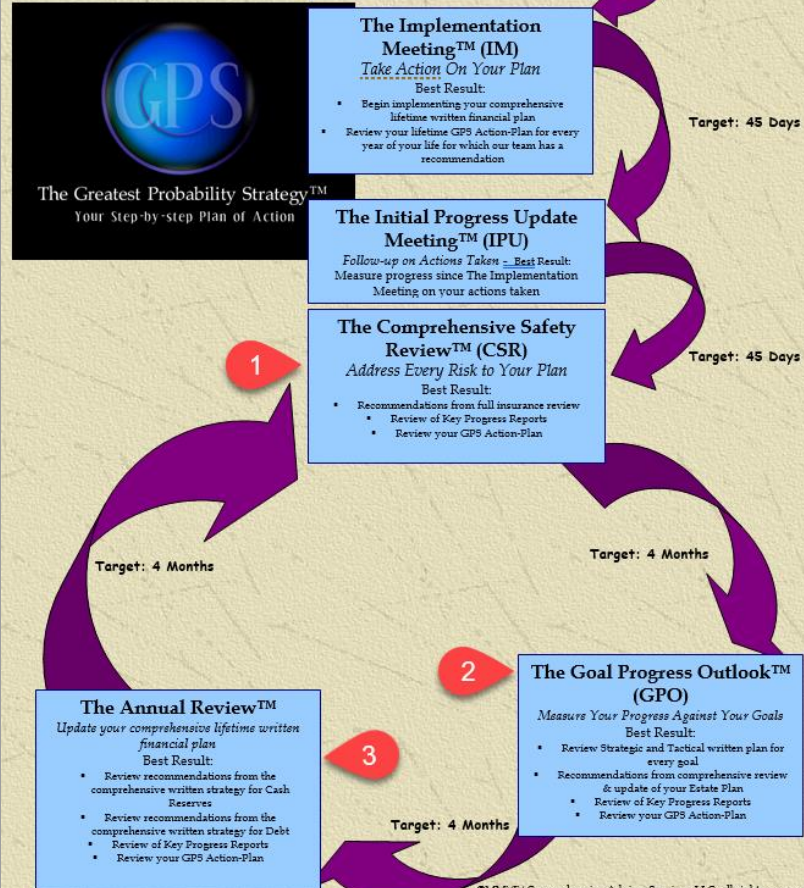
Target: 4 Months

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* (overarching plan) is *completed before* The INITIAL Comprehensive Safety Review™

(The first 104 days)

The Three Meeting Process™



The 3 *Recurring Meetings* represent what most teams are referring to when they describe The Three Meeting Process™

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

Target: 45 Days

The Comprehensive Safety Review™ (CSR)
Address Every Risk to Your Plan
Best Result:

- Recommendations from full insurance review
 - Review of Key Progress Reports
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Target: 4 Months

Target: 4 Months

The Annual Review™
Update your comprehensive lifetime written financial plan
Best Result:

- Review recommendations from the comprehensive written strategy for Cash Reserves
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Target: 4 Months

The Goal Progress Outlook™ (GPO)
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Best Result:

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The Three Meeting Process™

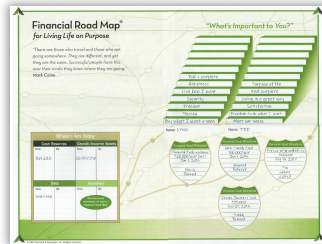
“One Time” Meeting #1:

This is your **Lead Conversion Process**: Converting a Potential Ideal Client into an actual paying client

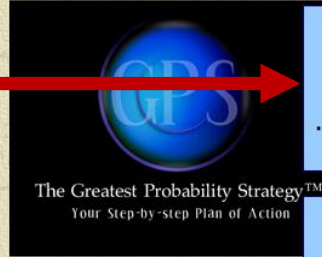
For me this is The Financial Road Map® Meeting...

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.



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

Target: 45 Days

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: 4 Months

Target: 4 Months

The Annual Review™
Update your comprehensive lifetime written financial plan
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:
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• Review of Key Progress Reports
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The Three Meeting Process™

“One Time” Meeting #2:

This is your meeting to **finalize** all client documentation required and to **receive** items still needed from your new Ideal Client (information or documents needed)

- ✓ Your first opportunity to provide **action items** to your Ideal Client.
- ✓ This is usually the first meeting a Trusted Advisor will **begin charging** for ***Truly Comprehensive Financial Services™***

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

14 days after the last meeting

The Three Meeting Process™



The Greatest Probability Strategy™
Your Step-by-Step Plan of Action

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 plan
Best Result:
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Target: 4 Months

The Goal Progress Outlook™ (GPO)
Measure Your Progress Against Your Goals
Best Result:
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• Review of Key Progress Reports
• Review your GPS Action-Plan

The Three Meeting Process™

“One Time” Meeting #3:

This is your meeting present your draft of this Ideal Client’s overarching plan your team has created.

- ✓ Your first opportunity to report whether your client is **on track** or **off track**.
- ✓ This is the first meeting an Ideal Client should begin feeling substantial value from **Truly Comprehensive Financial Services™**

The Initial Progress Update Meeting™ (IPU)

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

45 days after the last meeting

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

Target: 45 Days

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: 4 Months

Target: 4 Months

The Annual Review™
Update your comprehensive lifetime written financial plan
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
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The Three Meeting Process™

“Recurring” Meeting #1:

This is your meeting where your team has **completed the Overarching Plan** and you have released this Ideal Client into the routine Three Meeting Process™.

- ✓ Your **Insurance Subject Matter Expert** drives this meeting plan
- ✓ Focus is upon identifying risks to this plan and create strategies to increase safety of the plan.
- ✓ All insurance is fully reviewed

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

45 days after the last meeting

The Three Meeting Process™



The Greatest Probability Strategy™
Your Step-by-step Plan of Action

The Initial Client Interview™
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Target: 4 Months

Target: 4 Months

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Target: 4 Months

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Best Result:
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The Three Meeting Process™

“Recurring” Meeting #2:

This is the meeting where your team
Focuses on the **accumulation** & **funding**
plans for every goal your client has shared
with you

- ✓ Your **Financial Planning Subject Matter Expert & Estate Planning Subject Matter Expert** drive this meeting plan
- ✓ Focus a plan for **each goal**
- ✓ **Estate Plan** is fully reviewed with client

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
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4 months after the last meeting

The Three Meeting Process™



The Greatest Probability Strategy™
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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

Target: 45 Days

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: 4 Months

Target: 4 Months

The Annual Review™
Update your comprehensive lifetime written financial plan
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

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

Target: 4 Months

The Three Meeting Process™

“Recurring” Meeting #3:

This is the meeting where your team reviews forward progress and assesses the Ideal Client relationship

- ✓ Your **Financial Planning Subject Matter Expert & Money Management Subject Matter Expert** drive this meeting plan
- ✓ Focus **cash reserves** and the plan for maintaining cash for contingencies
- ✓ Focus **debt** and the plan for reducing and ultimately eliminating debt

The Annual Review™

Update your comprehensive lifetime written financial plan

Best Result:

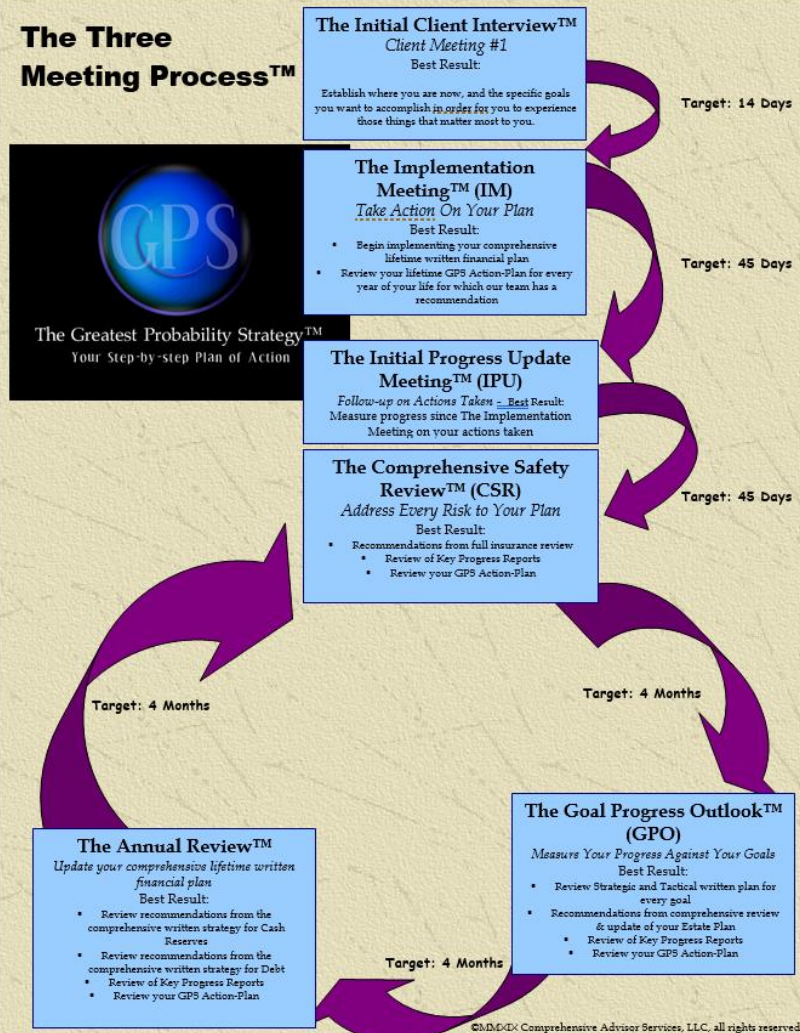
- Review recommendations from the comprehensive written strategy for Cash Reserves
- Review recommendations from the comprehensive written strategy for Debt
 - Review of Key Progress Reports
 - Review your GPS Action-Plan

4 months after the last meeting

Tax Planning

In the U.S. the **Tax Planning Subject Matter Expert** drives client progress meetings during...

- ✓ Sep
- ✓ Oct
- ✓ Nov
- ✓ Dec



Structuring my compensation?



You mentioned in the training that the average Financial Advisor in your advanced program is charging \$25k per client.

My question is what is the average client net worth? Is it a million a couple million? What is the average client for the \$25k?

\$8,350 per meeting rather than \$25,000/year

- ✓ \$? : The Initial Client Interview™ (charge whatever you wish)
- ✓ \$8,350: The Initial Progress Update™
- ✓ \$8,350: The INITIAL Comprehensive Safety Review™
 - ✓ \$ 16,700: For your team to complete your Ideal Client's comprehensive written lifetime financial strategy (the first 104 days to complete the overarching plan)
- ✓ \$8,350: The Goal Progress Outlook™ (4 months)
- ✓ \$8,350: The Annual Review™ (4 months)
- ✓ \$8,350: The Comprehensive Safety Review™ (4 months)
 - ✓ \$25,050 per year recurring



Increasing your
success in
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

Advisor PACT™ Monthly

"Contact Us" link
is found on
every page in
our system

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 a Project Leader for your business.

[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

April 16, 2019

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ADVISOR PACT



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.