ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT Monthly Session™

May 21, 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…

- ✓ Turn everything **else** off.
- ✓ For the next hour, don't check **emails**
- ✓ Close all **browsers**
- ✓ Turn off your **Phone**
- ✓ Multi-tasking **isn't** a thing (focus is the thing)

Have You Considered…

Something discussed today might just be a game-changer for your business?
You might miss it… if you're not focused.

Your ADVISOR PACT Pledge

PROTECTION

ATTENTION

COORDINATION

TRANSPARENCY

To every Ideal Client

I just joined this program

I’ve blocked time to begin going through my first two course lessons, but I have a big-picture question.

This program was strongly recommended to me by my firm, but could you give me the view from 30,000 feet for a beginner?

What’s the purpose of The Advisor P.A.C.T. Monthly Program™?

Spontaneous Unsolicited Client Referrals

How does
The Advisor P.A.C.T. Monthly Program™
help me drive
unsolicited client referrals?

May 21, 2019

ADVISOR PACT

Consistently Exceeding Ideal Client Expectations

"Why EXCEED?"

"Why not just MEET Ideal Client Expectations?"

It's a pretty high bar but..

Exceeding client expectations is the only standard which guarantees client referrals

If you want a person to remark about you to the others in their life…

… you have to be remarkable

… you have to *exceed* their expectations


If your goal is to "not get fired" then perhaps it's OK to set your objective to *meet* your clients' expectations.

… but that's setting a pretty low bar

However, if your plan is to receive spontaneous unsolicited client referrals, you'll have to raise the bar and *exceed* your Ideal Clients' expectations.

There's another problem with just *meeting* client expectations…

The reality is that
meeting a client's expectations
is simply a formula for "not getting fired"

We imagine that since clients are
continuing to work with us
we assume we're ***meeting*** their expectations

(otherwise they'd fire us… right?)

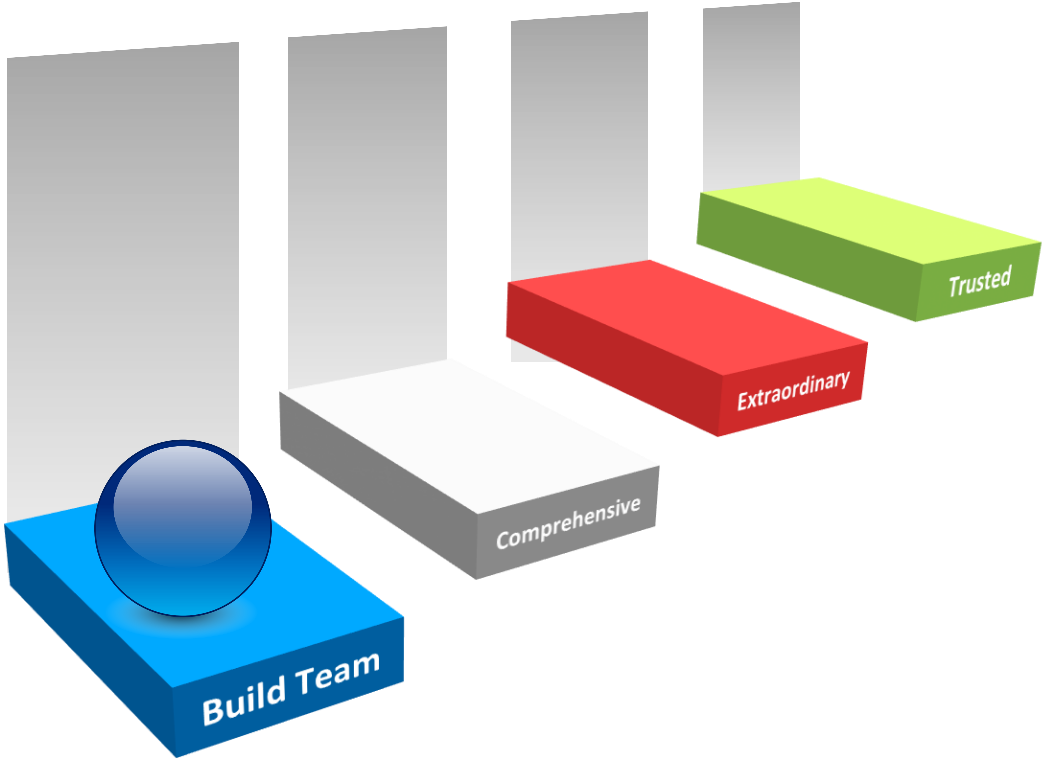
But the reality is…

We don't know!

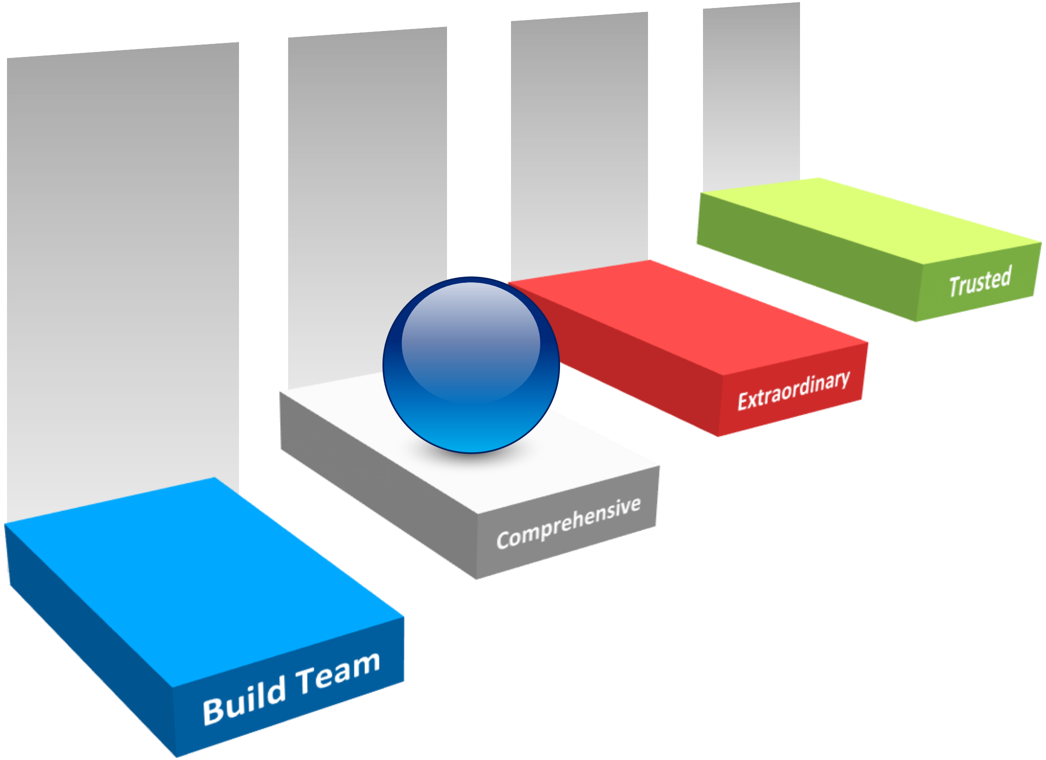
Without receiving any referrals from a client,
we're unsure what's happening with that client

However, when we receive a client referral,
we know for sure that
we're ***exceeding*** that client's expectations
(otherwise they wouldn't risk referring us)

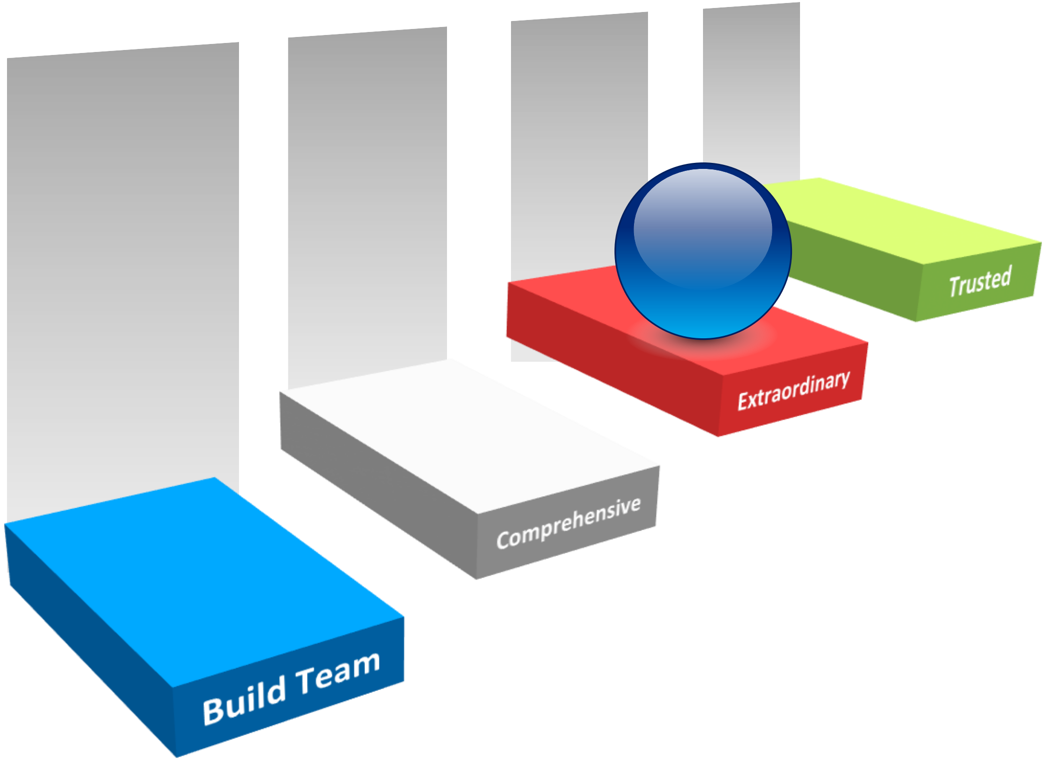
Delivering on The Promise



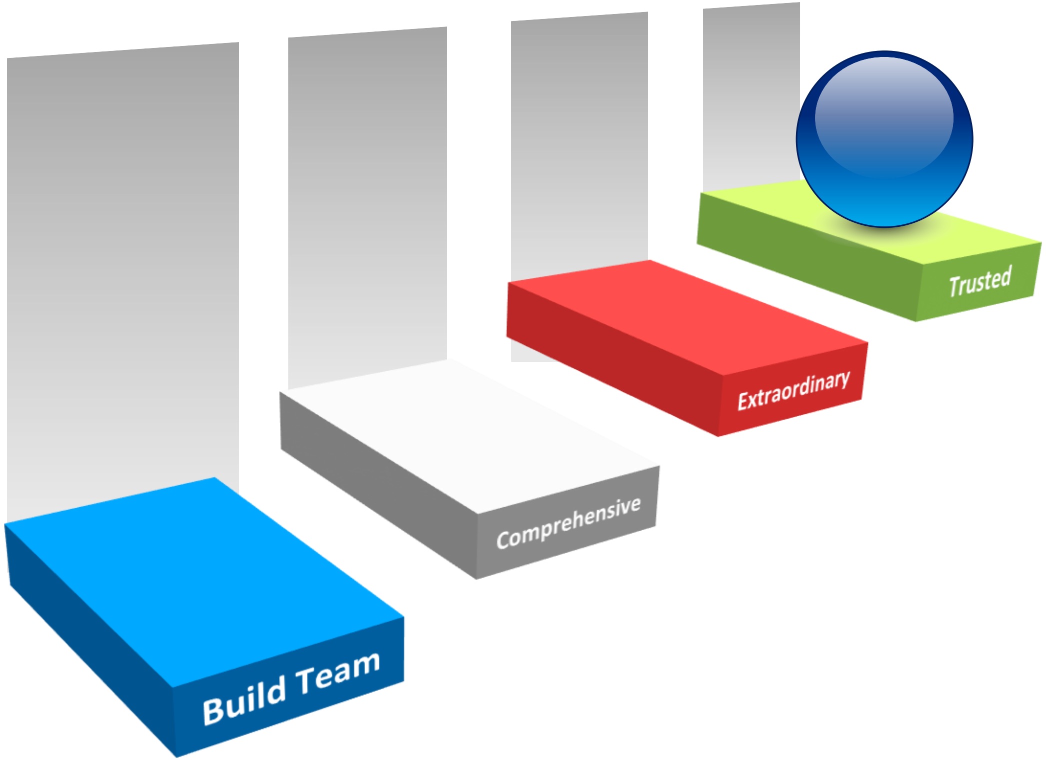
Delivering on The Promise



Delivering on The Promise



Delivering on The Promise



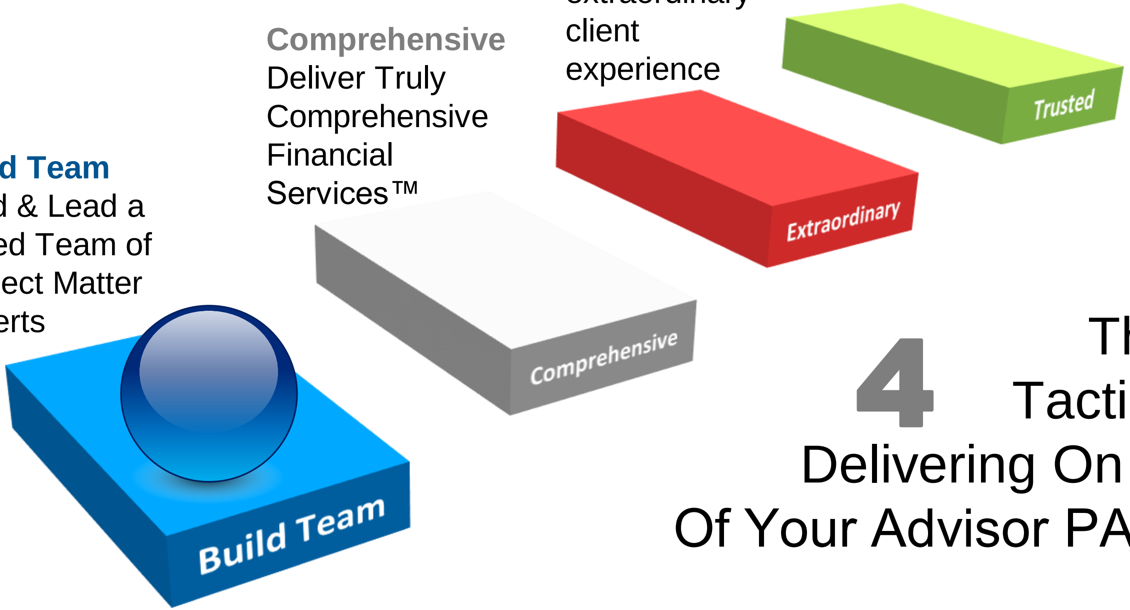
Delivering on The Promise

Trusted
Become the **MOST** Trusted Advisor

Extraordinary
Deliver an extraordinary client experience

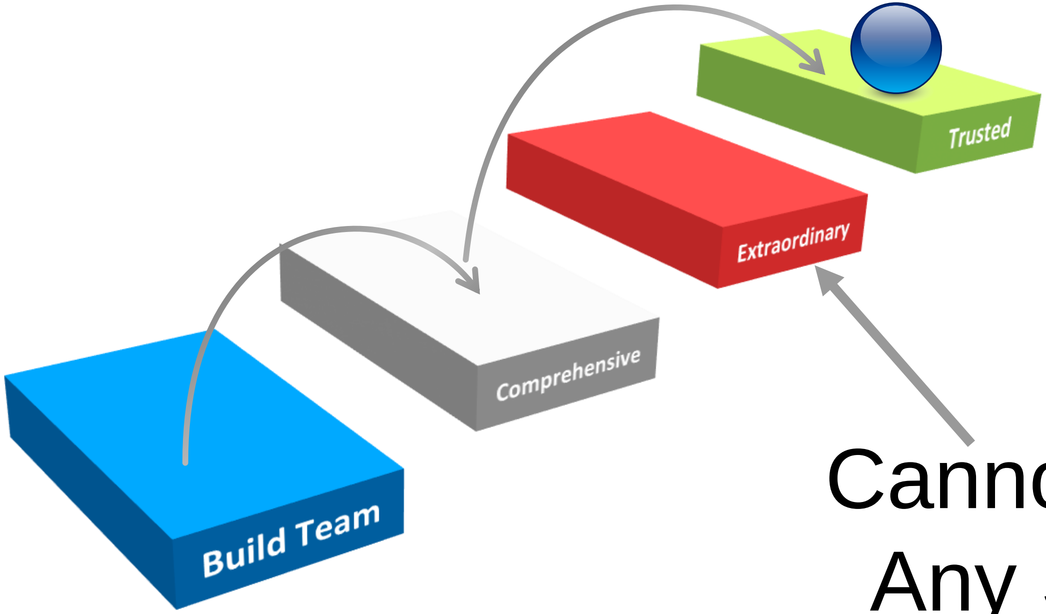
Comprehensive
Deliver Truly Comprehensive Financial Services™

Build Team
Build & Lead a skilled Team of Subject Matter Experts



4 These Are The Tactical Steps For Delivering On The Promise Of Your Advisor PACT™ Pledge

Delivering on The Promise



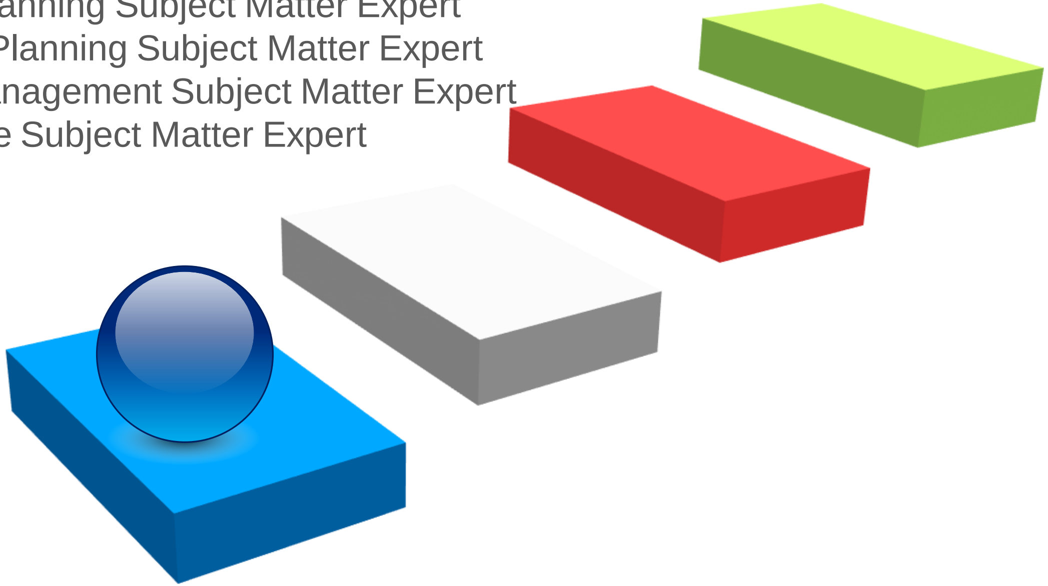
Cannot **Skip**
Any Steps

Delivering on The Promise – Build Team

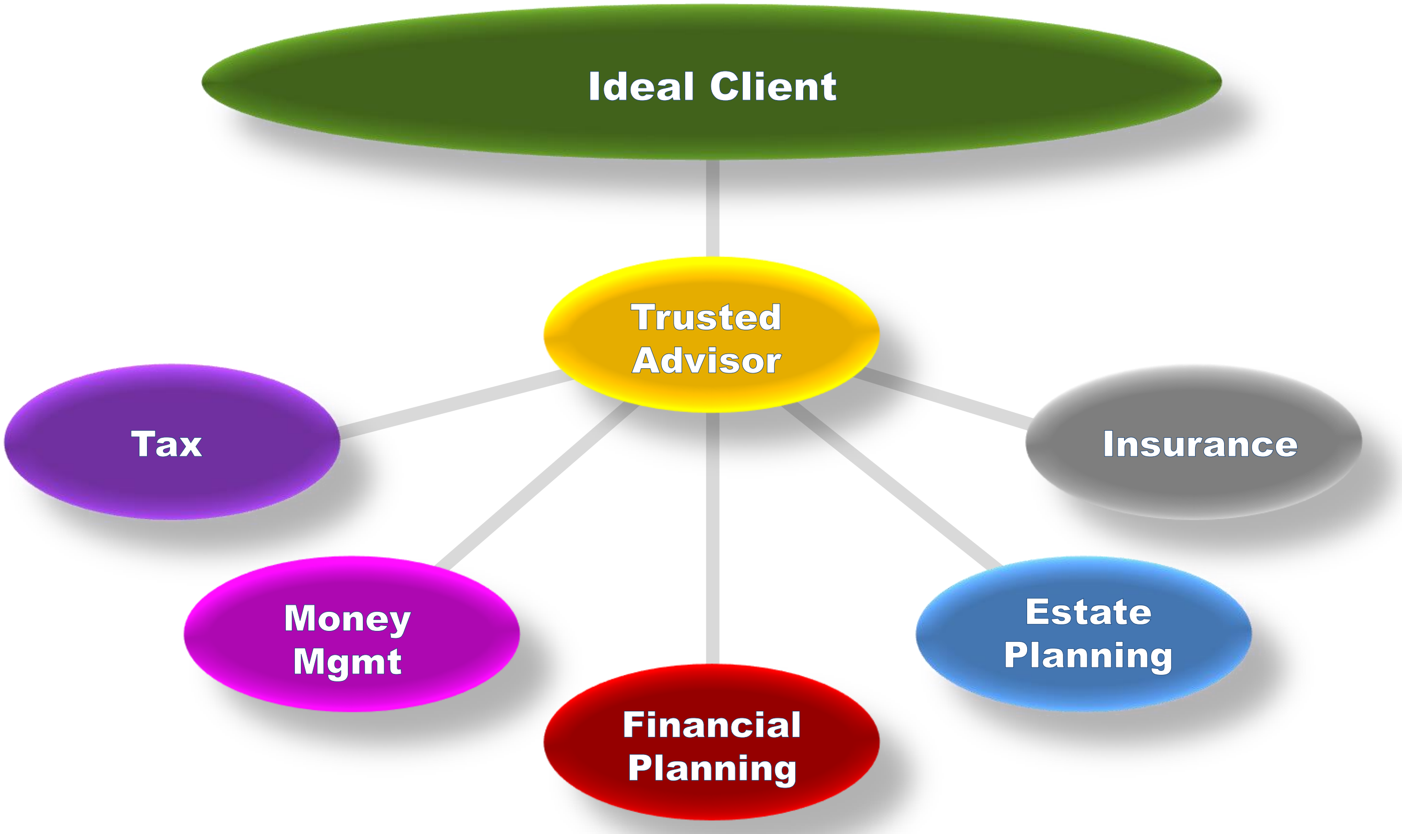
Build & Lead Your Team

We're going to build a team of highly skilled Subject Matter Experts.

- ✓ A Tax Planning Subject Matter Expert
- ✓ An Estate Planning Subject Matter Expert
- ✓ A Financial Planning Subject Matter Expert
- ✓ A Money Management Subject Matter Expert
- ✓ An Insurance Subject Matter Expert



Our Team Structure



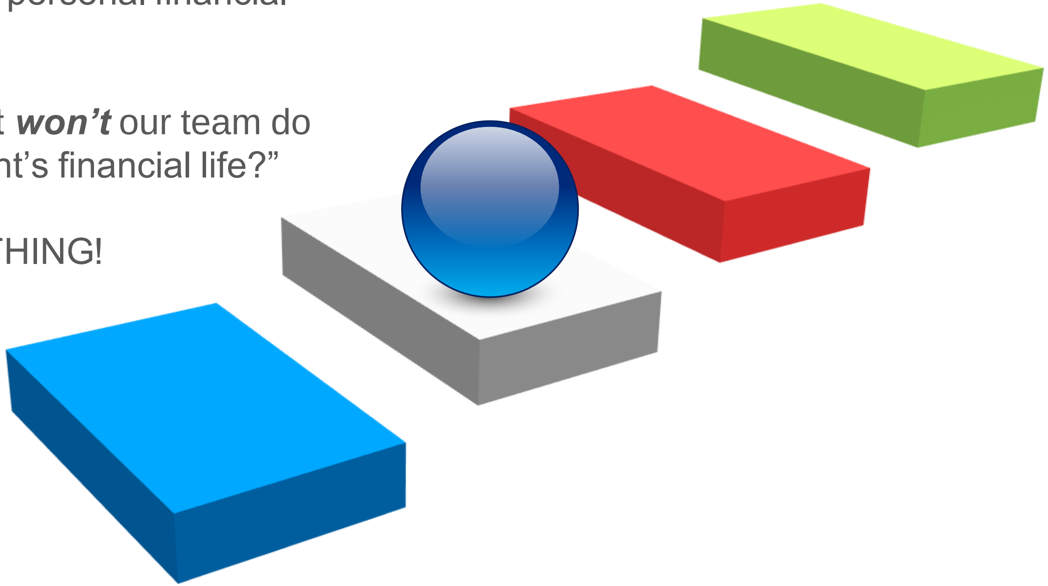
Delivering on The Promise - Comprehensive

Implement Truly Comprehensive Financial Services™

Our skilled team of Subject Matter Experts will coordinate all aspects of an Ideal Client's personal financial affairs.

"Potentially what ***won't*** our team do for an Ideal Client's financial life?"

Answer: … NOTHING!

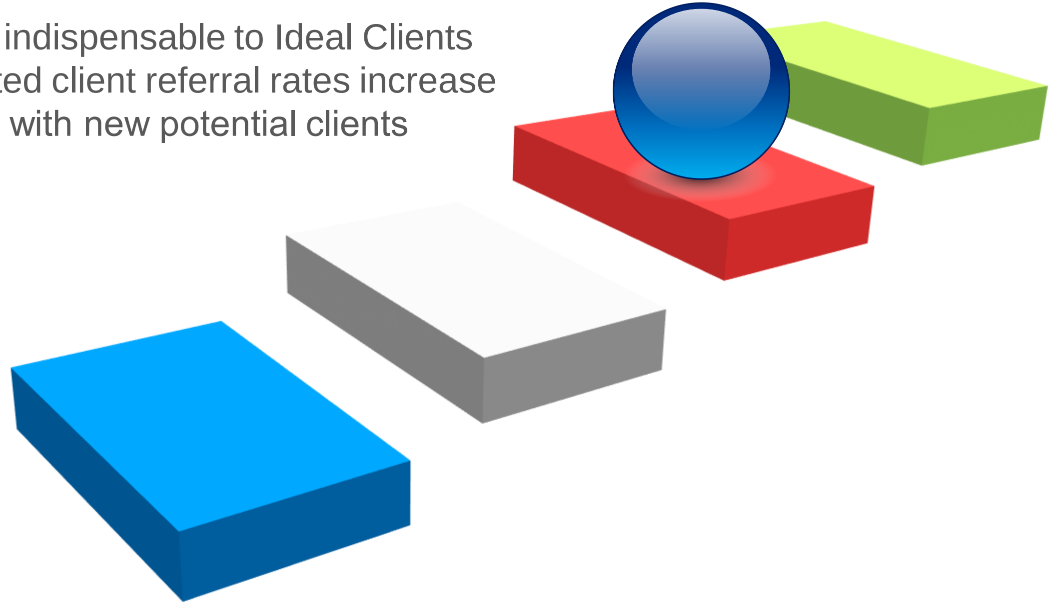


Delivering on The Promise - Extraordinary

Delivering an Extraordinary Client Experience

Our team won't stop increasing value to our clients until

- ✓ We become indispensable to Ideal Clients
- ✓ Our unsolicited client referral rates increase (I'm meeting with new potential clients every day)

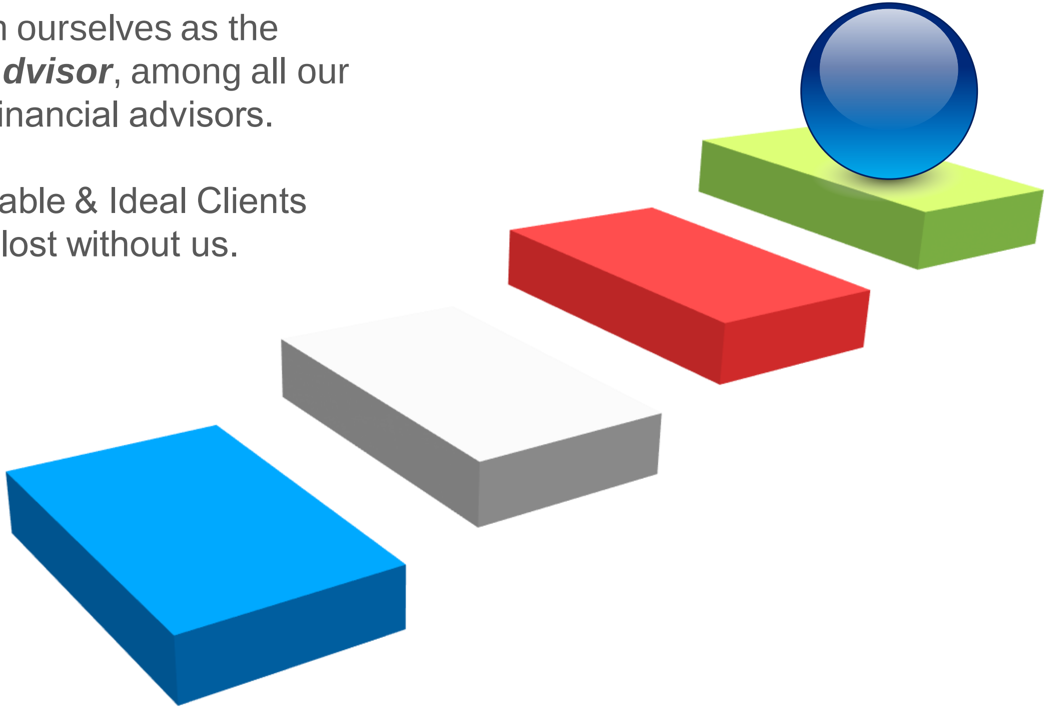


Delivering on The Promise - Trusted

Become The Most Trusted Advisor

We will establish ourselves as the ***Most Trusted Advisor***, among all our client's various financial advisors.

We're indispensable & Ideal Clients tell us they'd be lost without us.

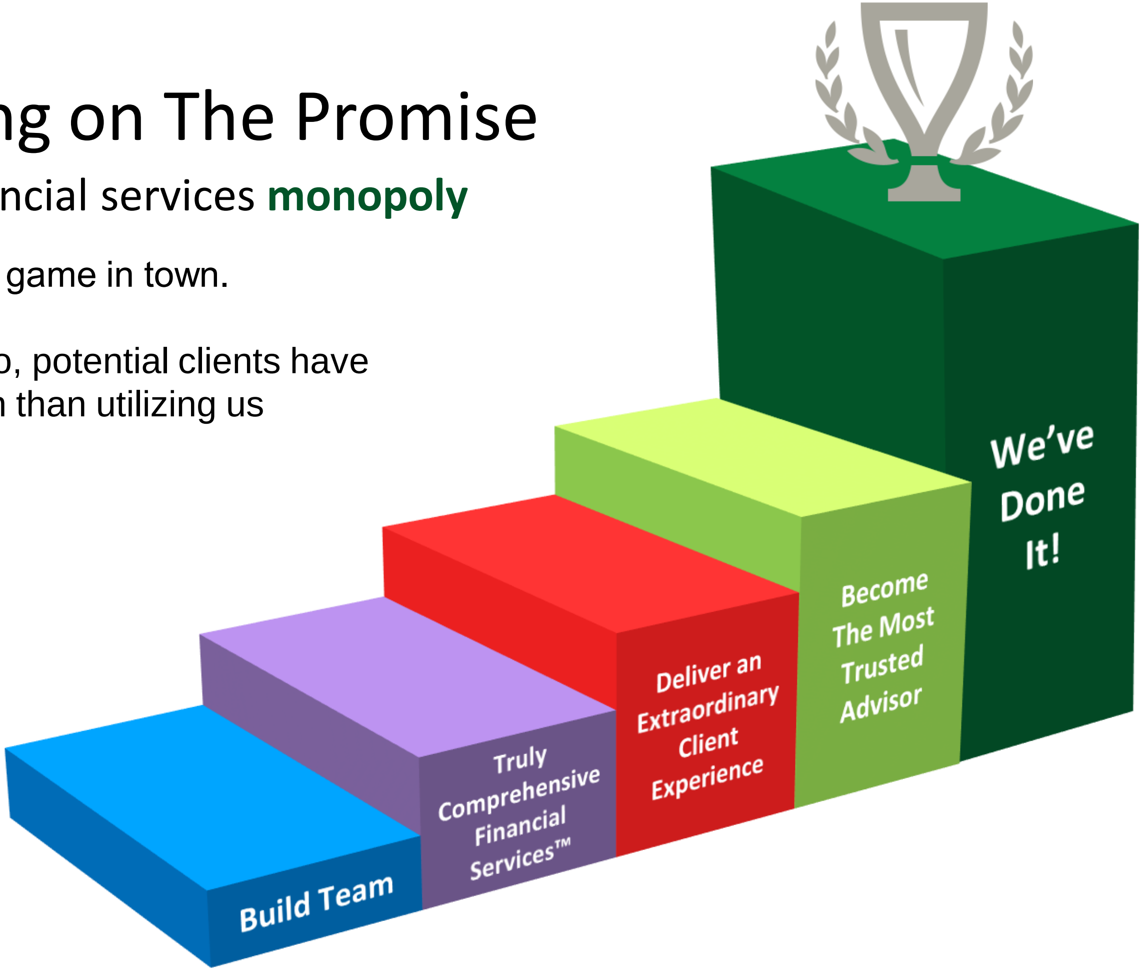


Delivering on The Promise

We're a financial services **monopoly**

We're the only game in town.

For what we do, potential clients have no other option than utilizing us

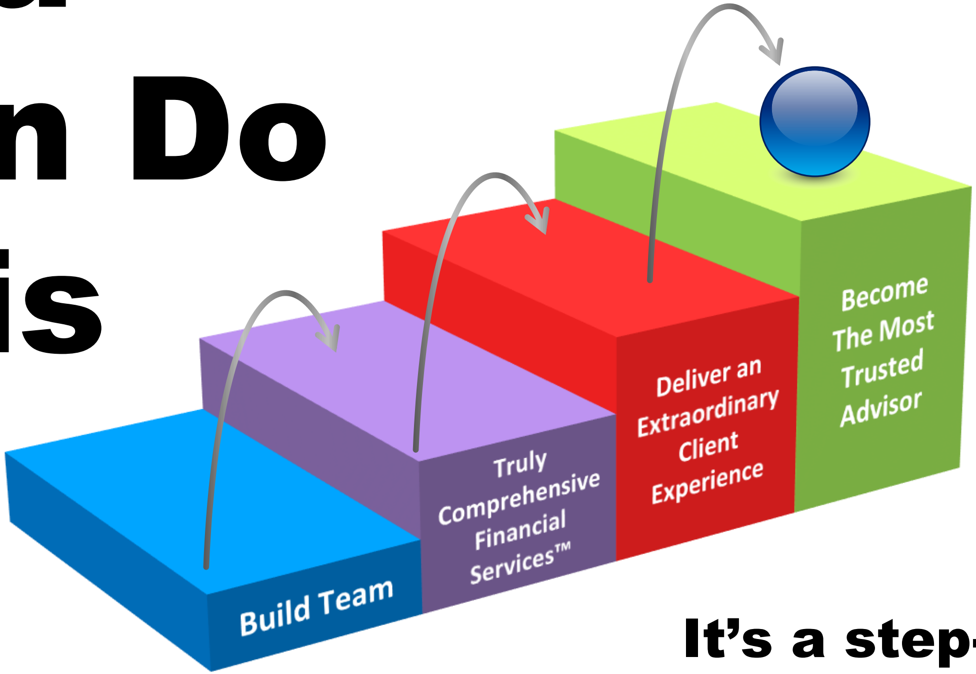


Delivering on The Promise

ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

You Can Do This



It's a step-by-step process

I acquired my first Ideal Client yesterday.

I’m also in the middle of setting up my Registered Investment Advisor (RIA) entity with the firm you recommended. I hope to have it up and running so I can receive my first ideal client payment by the end of this month.

Here’s my question for today: I’d like to offer clients to be able to pay via ACH or credit card. Googling this brings up so much. Thanks in advance for your thoughts.

Shop
Payroll Processing
Companies

Credit Card Merchant Account

(Start with your bank)

May 21, 2019

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Journal Your Fees From Investment Accounts

May 21, 2019

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Charge after each Client progress 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

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

I love the idea of having a team.

I'm excited about building a team of Subject Matter Experts but can't really afford to pay for a team right now.

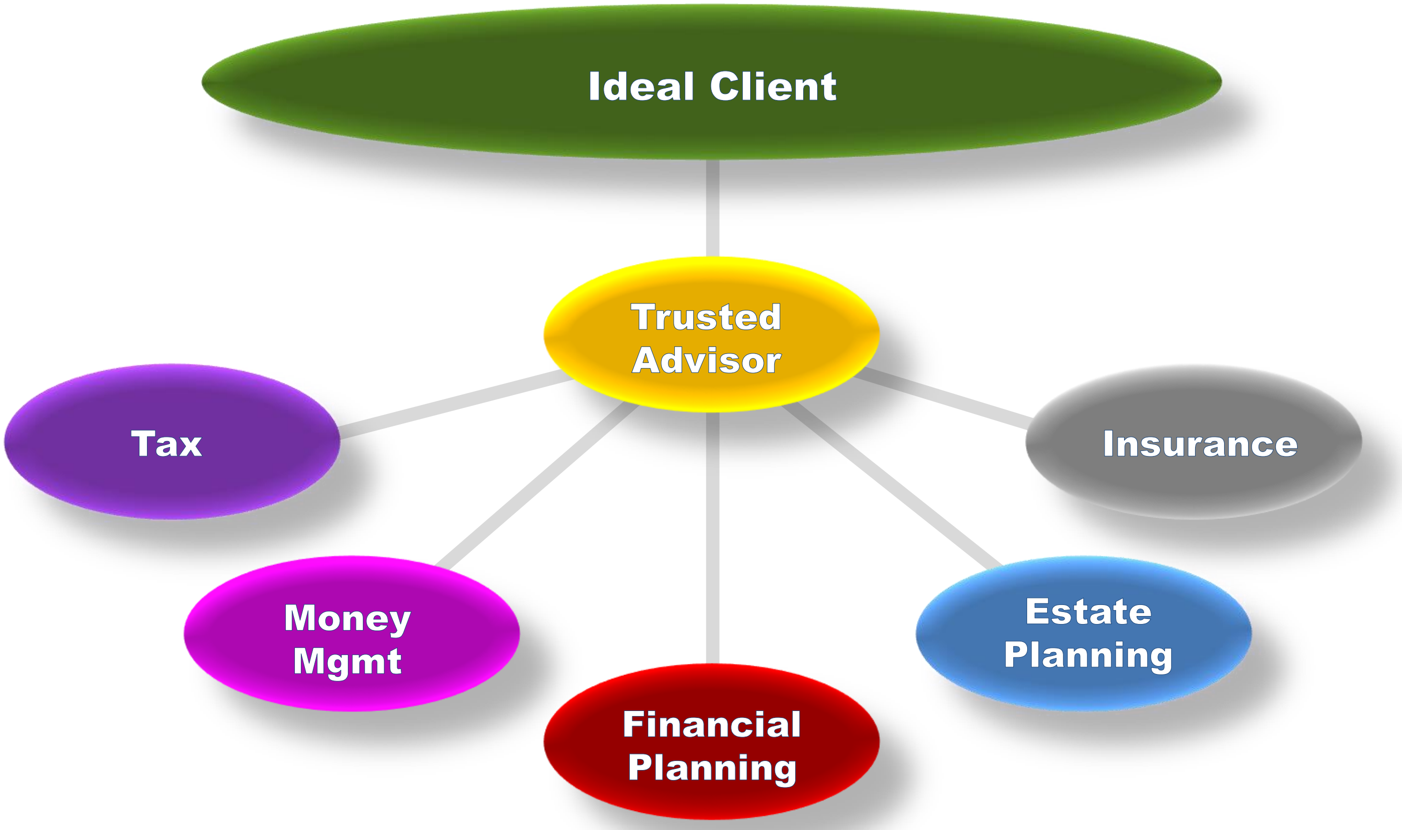
I know I'll be receiving a module for filling the SME vacancies, but how will we find qualified professionals capable of impressing my Ideal Clients. I've decided my fee will be $39,000/year for The Ten Client Deliverables™, so I expect my clients will have high expectations.

Finally, I've heard you say that we should only consider skilled SMEs for our team if they have at least 2 administrative support people on staff. That's 3 team members per SME. So, just curious, once my team's built how many total people will there be on the team?

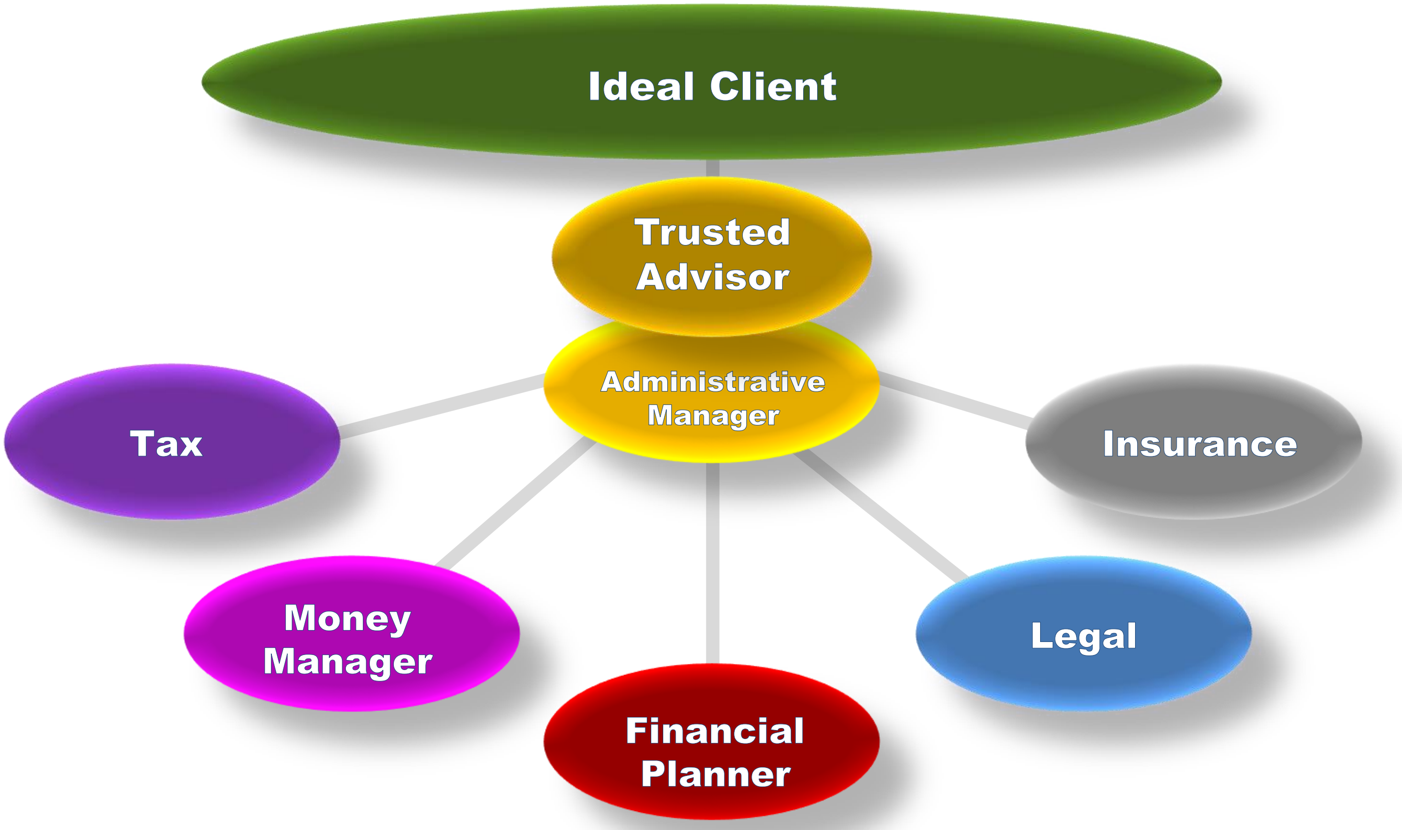
Fasten your seat belt…

…this may surprise you.

Our Business Model is different



Our Deliverables Team Structure



The process we teach for finding skilled Subject Matter Experts

AM's Responsibility: Find Skilled SME Candidates

The 4 Projects for Finding SME Candidates

1 Project #1

Professional Associations

2 Project #2

Approach Professionals for referrals

3 Project #3

Internet research & social media

Now your AM gets to display skills using the internet.
AM will use search engines (like google) to find
professionals you'll interview.

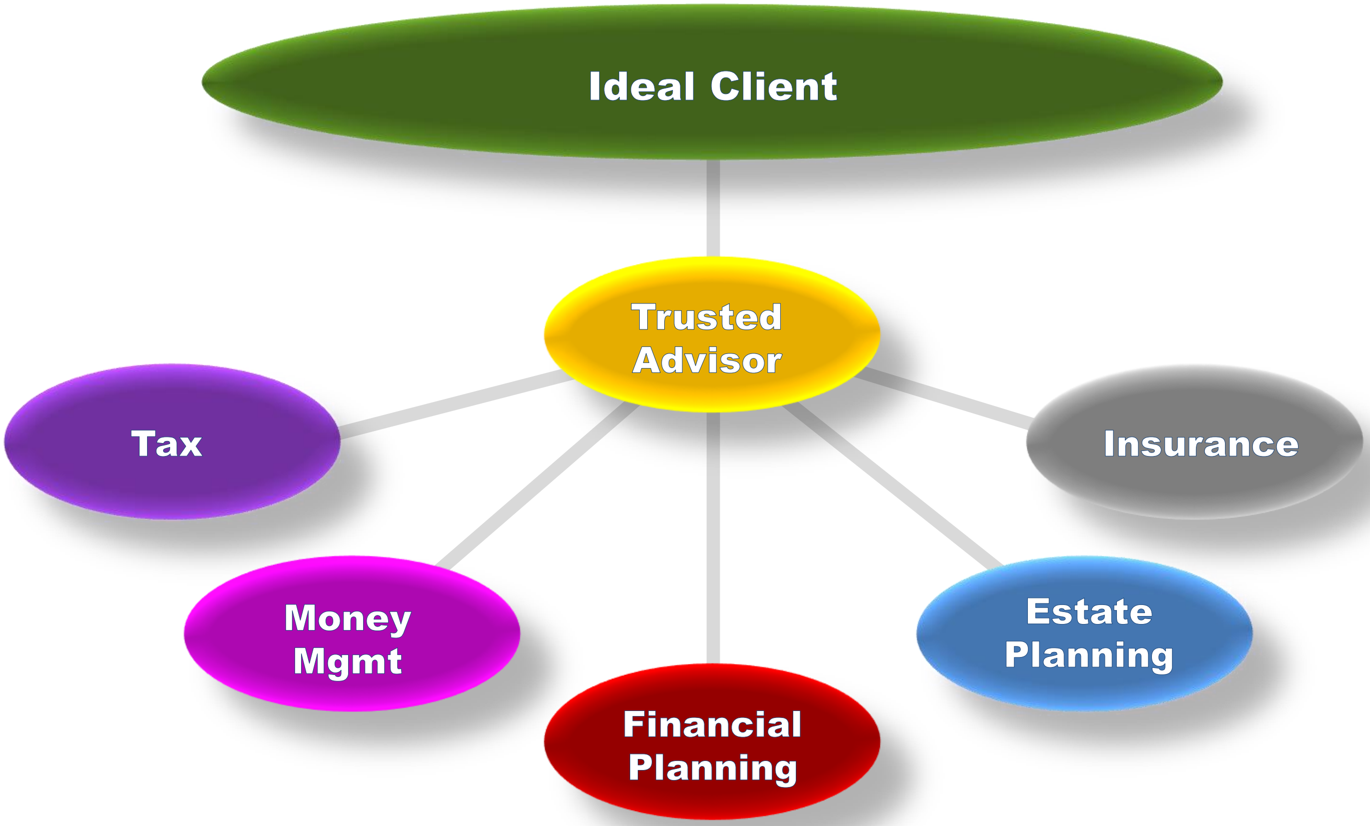
4 Project #4

E-mail your entire network

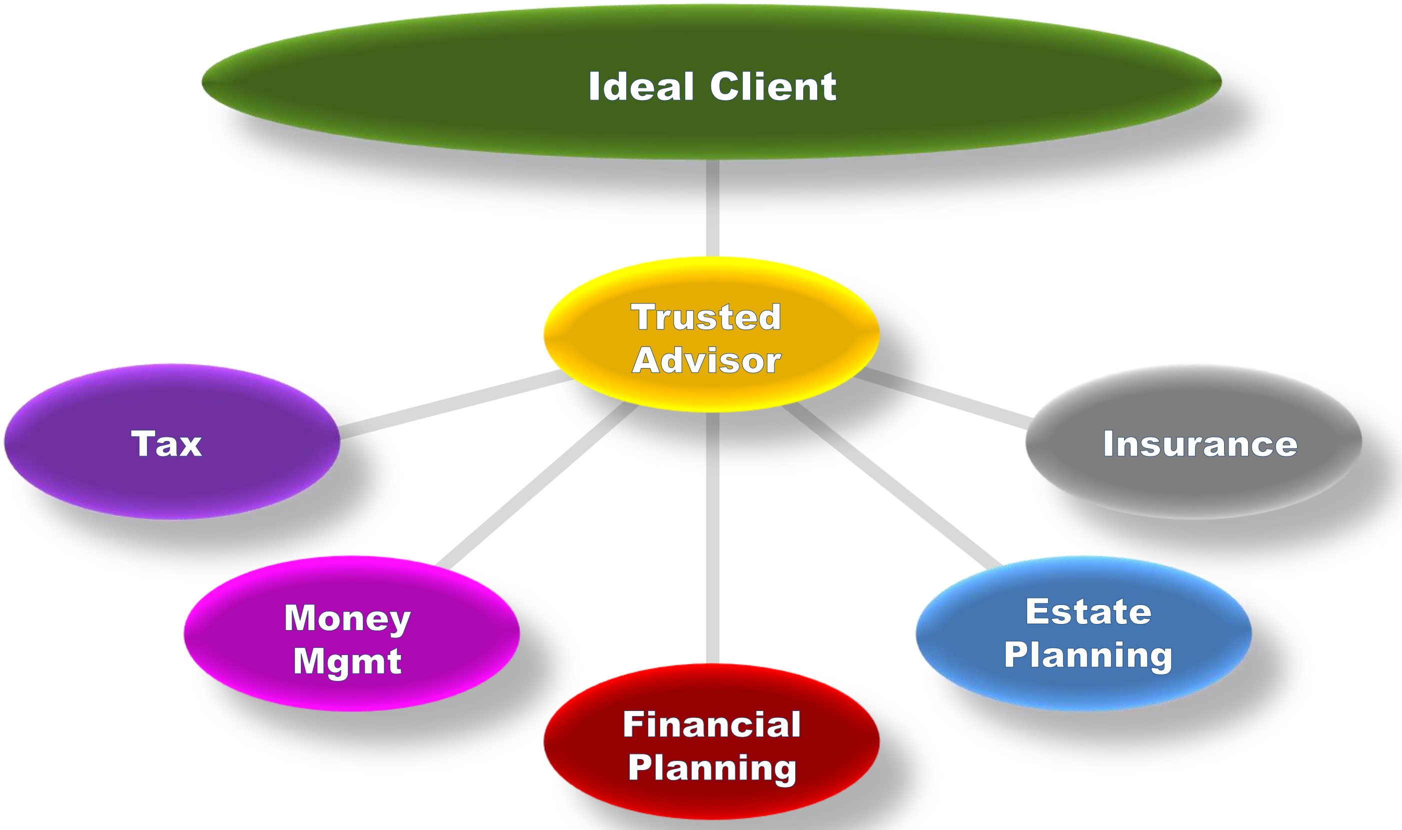
Send email broadcast to your entire network.
Let everyone you know that you're hiring.
You never know when someone in your personal network
can refer you to highly skilled professional referrals

What your team will look like when you've filled **all** vacancies

Our Business Model is different



The Best Structure For Exceeding Clients' Expectations



Our Deliverables Team Structure

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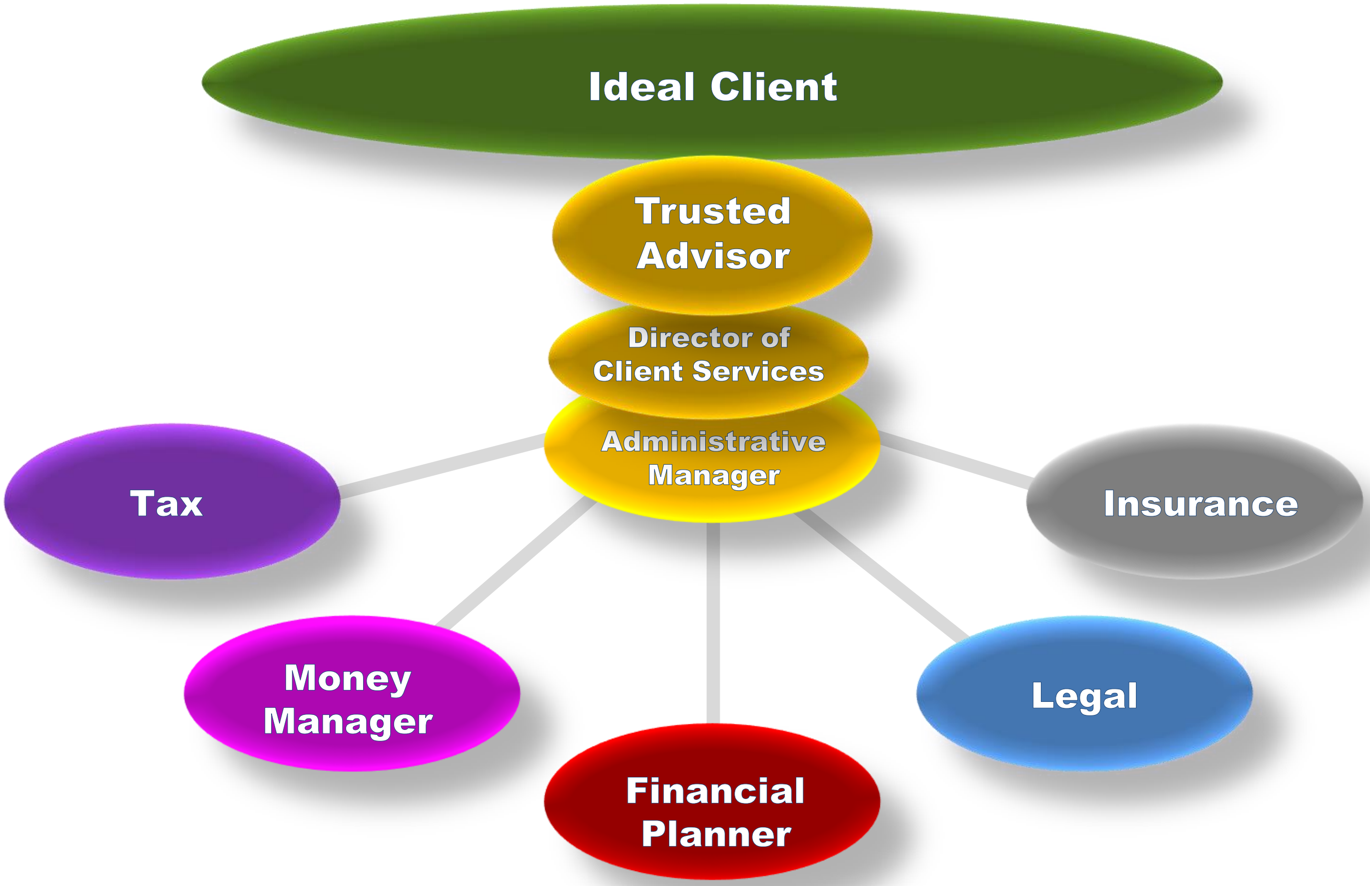
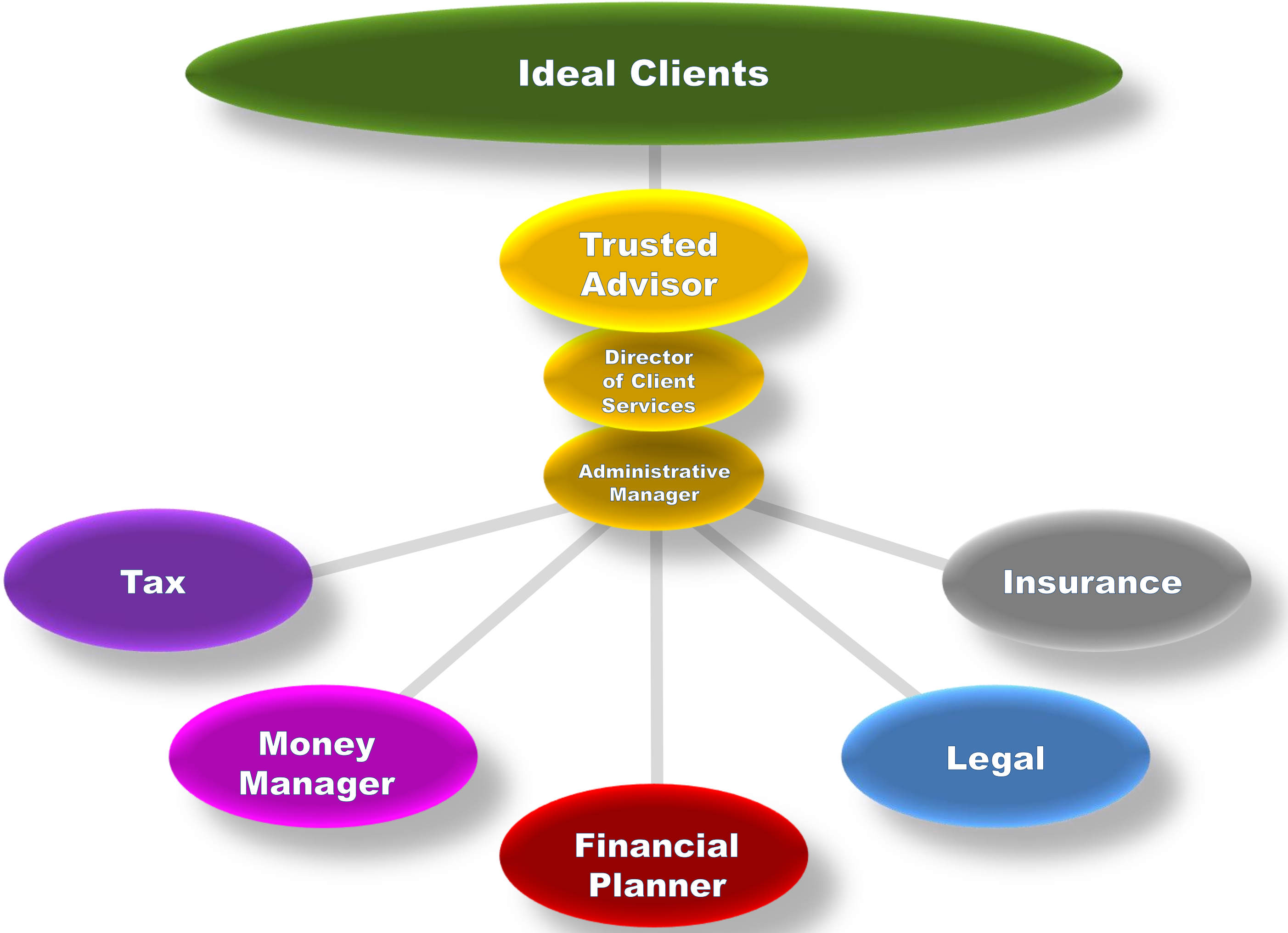
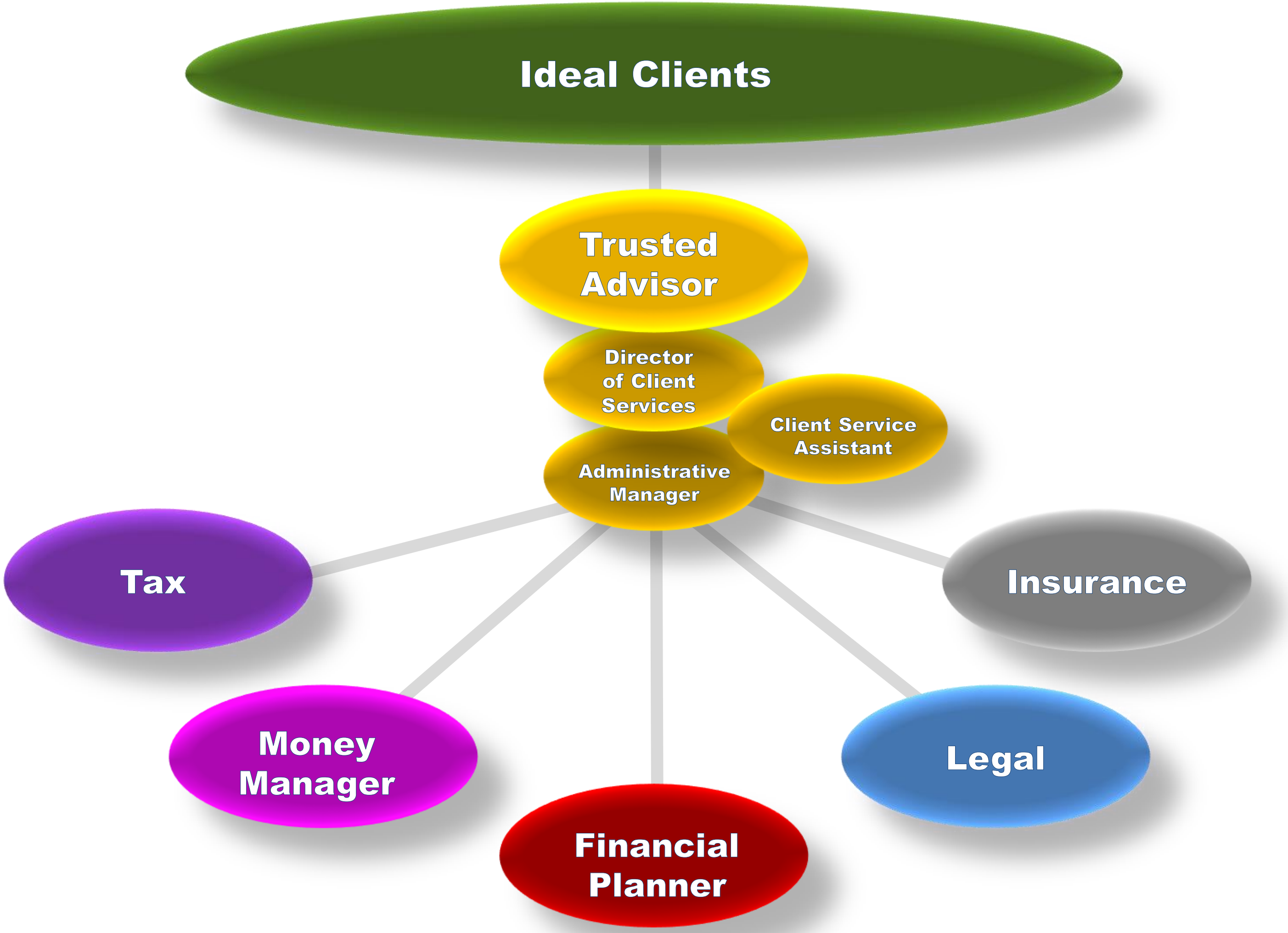
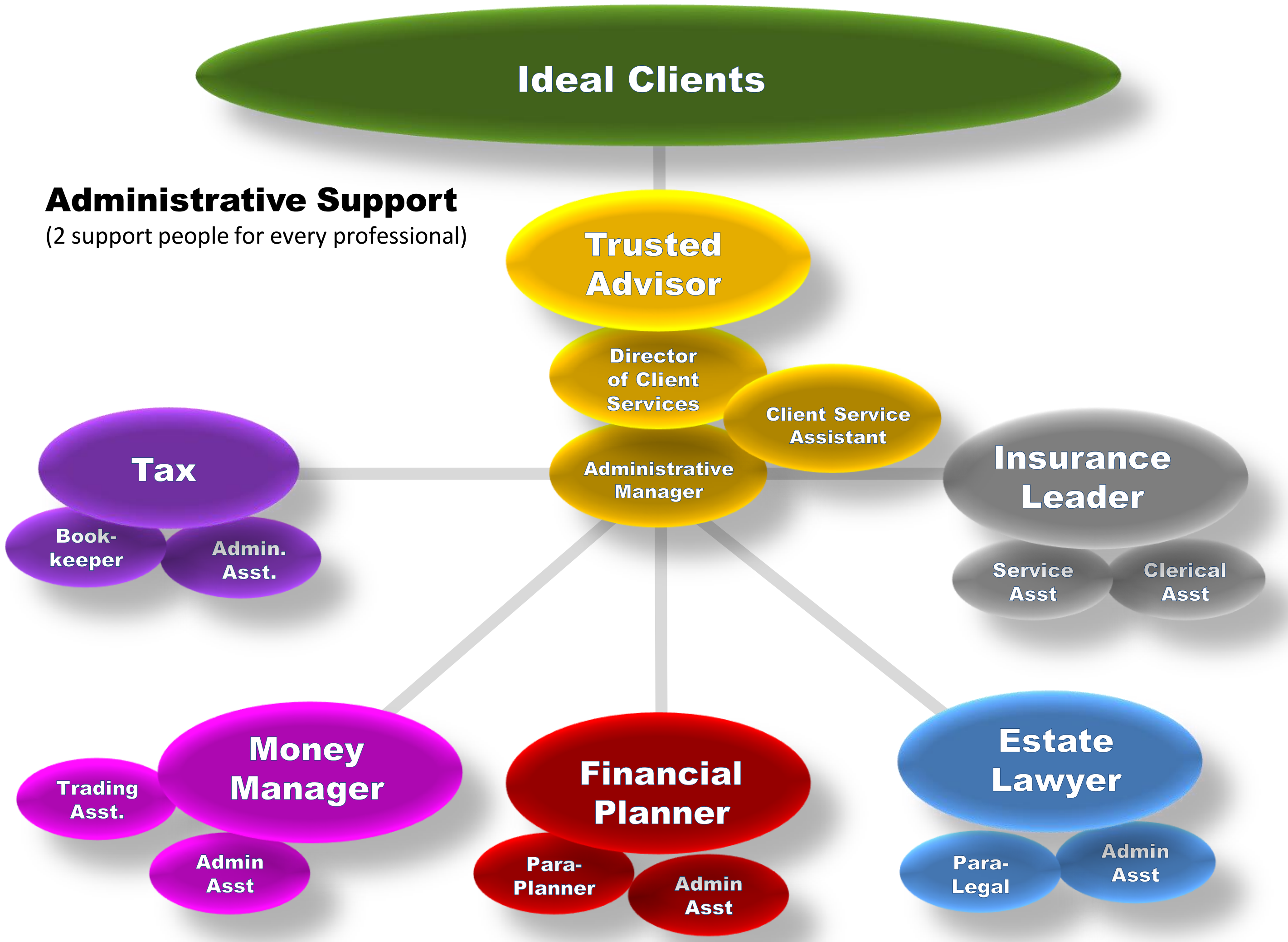
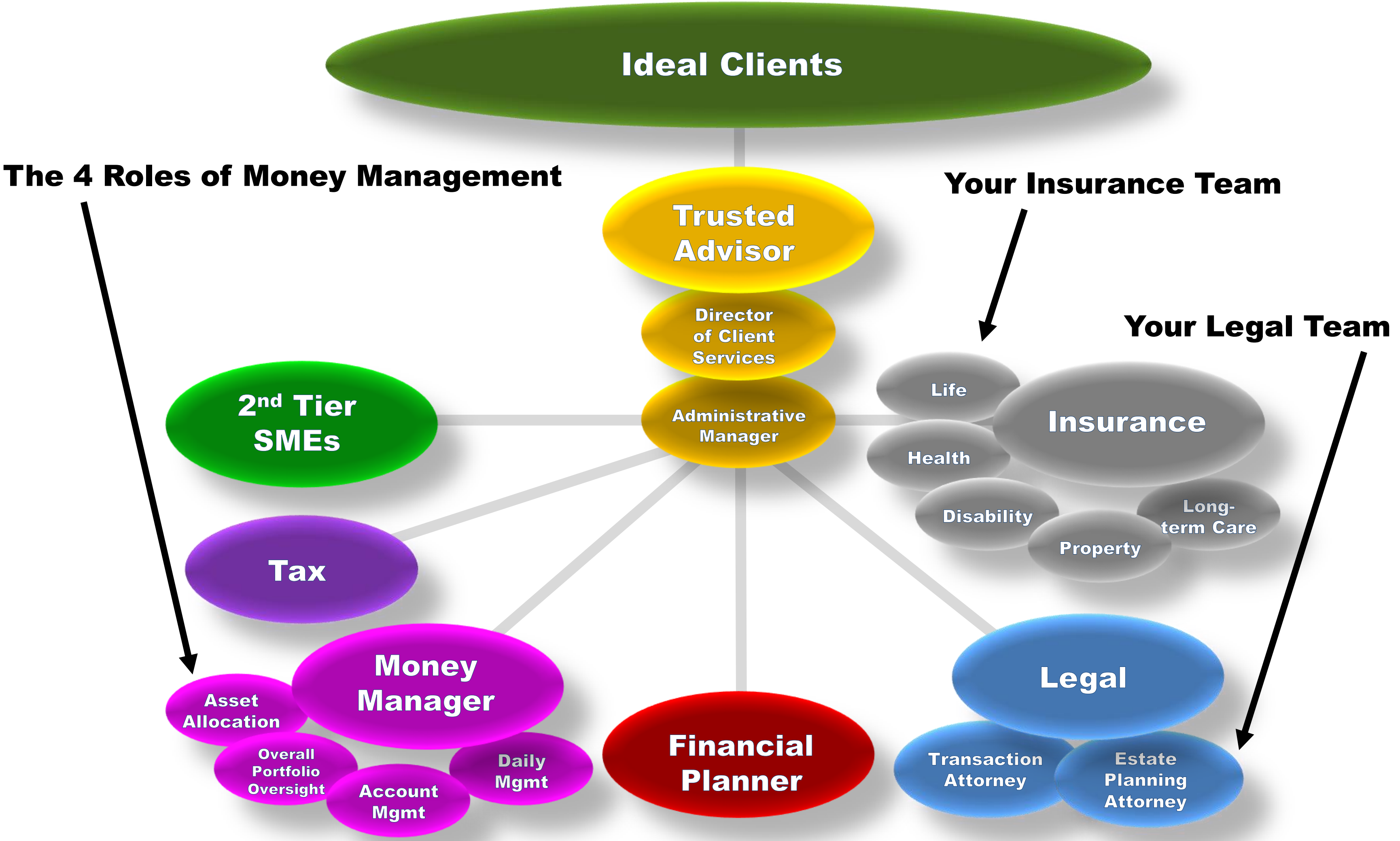



Ideal Clients
Trusted Advisor
Director of Client Services
Administrative Manager
Tax
Money Manager
Financial Planner
Legal
Insurance


Ideal Clients
Trusted Advisor
Director of Client Services
Client Service Assistant
Administrative Manager
Tax
Insurance
Money Manager
Legal
Financial Planner

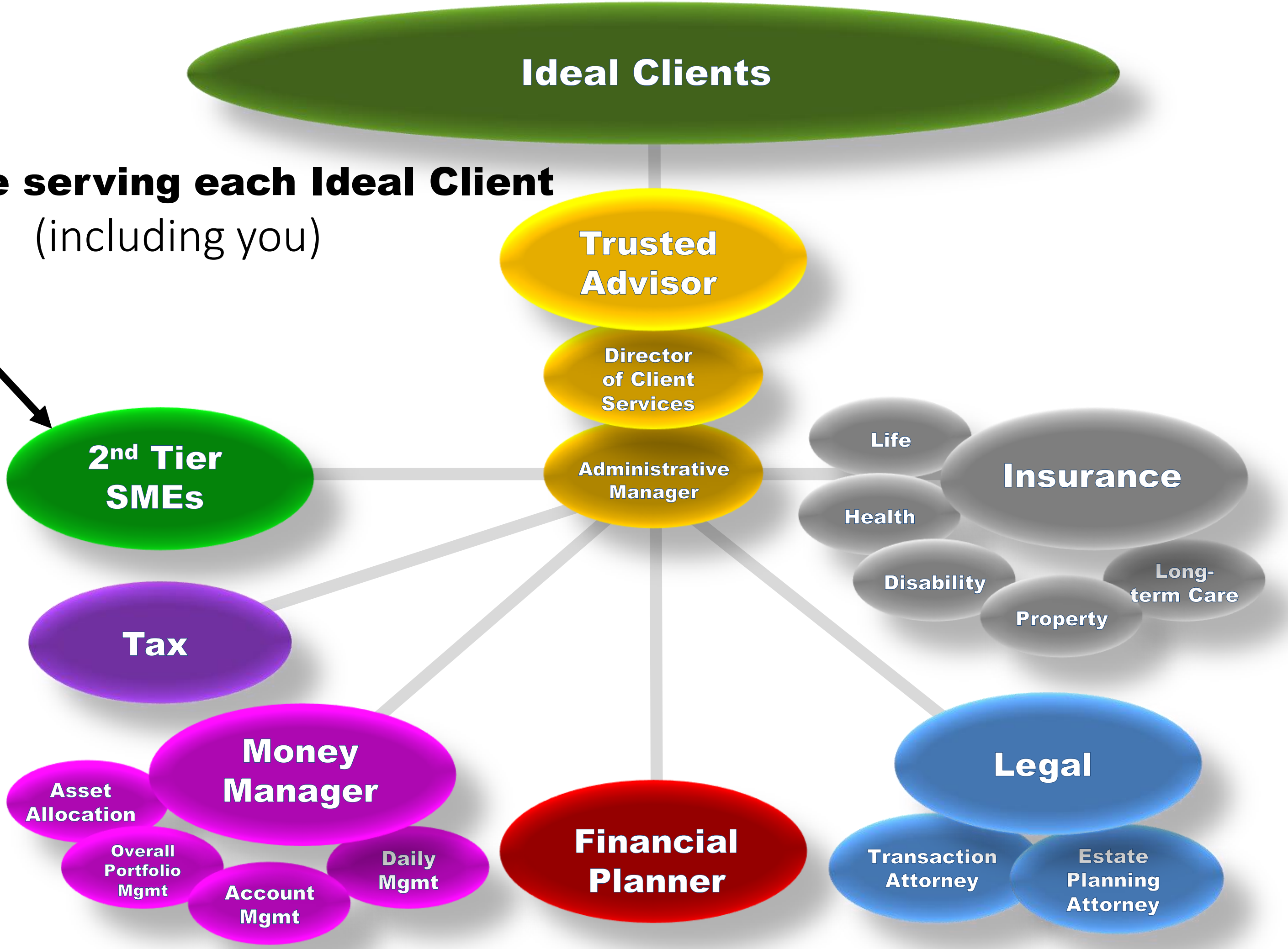


Ideal Clients
Administrative Support
(2 support people for every professional)
Trusted Advisor
Director of Client Services
Client Service Assistant
Administrative Manager
Tax
Book-keeper
Admin. Asst.
Insurance Leader
Service Asst
Clerical Asst
Money Manager
Trading Asst.
Admin Asst
Financial Planner
Para-Planner
Admin Asst
Estate Lawyer
Para-Legal
Admin Asst


Ideal Clients
The 4 Roles of Money Management
Trusted Advisor
Your Insurance Team
Director of Client Services
Your Legal Team
Life
Insurance
2nd Tier SMEs
Administrative Manager
Health
Disability
Long-term Care
Property
Tax
Money Manager
Legal
Asset Allocation
Overall Portfolio Oversight
Account Mgmt
Daily Mgmt
Financial Planner
Transaction Attorney
Estate Planning Attorney


Ideal Clients
3 on your payroll
Trusted Advisor
Director of Client Services
Administrative Manager
26 on your SME's teams
(including support people)
2nd Tier SMEs
Life
Insurance
Health
Disability
Long-term Care
Property
Tax
Money Manager
Asset Allocation
Overall Portfolio Mgmt
Account Mgmt
Daily Mgmt
Financial Planner
Legal
Transaction Attorney
Estate Planning Attorney

30 People serving each Ideal Client
(including you)



I love the idea of having a team.

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"Contact Us" link is found on every page in our system
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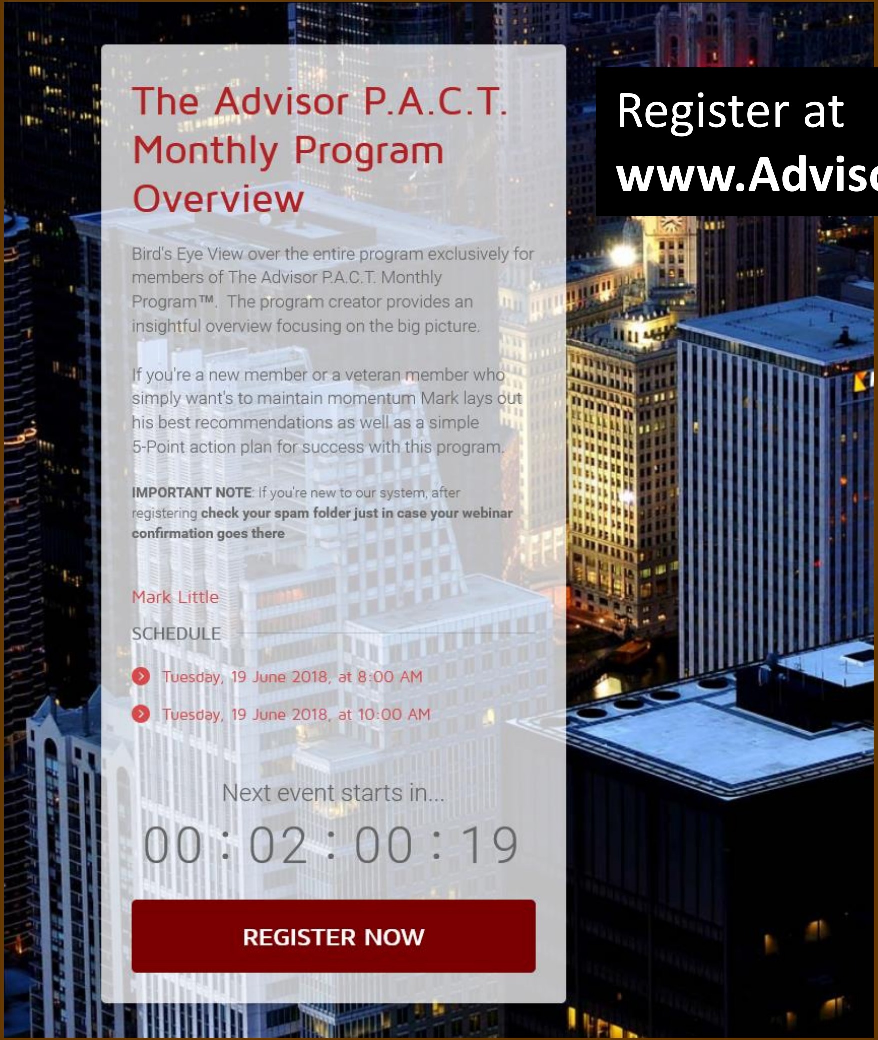
Increasing your success in The Advisor P.A.C.T. Monthly Program™


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 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

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

May 21, 2019

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.