ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT Monthly Session™

June 18, 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

4 Questions from a potential client

I just met with a potential client who meets my Ideal Client Profile. They were married and each had 2 questions. Rather than respond immediately I promised to get back to them with my most thoughtful reply.

So how does The Advisor PACT™ Method address these 4 questions?

1. I never know when I'm meeting with my current advisor, how often will we meet if we work together?
2. What makes you different than the other 3 Financial Advisors we're interviewing?
3. How will you deliver on the commitments you'll make to us up front?
4. How will we feel different (better) because we chose you over the other Financial Advisors who are wanting to work with us?

I never know when I’m meeting with my current advisor.

How often will we meet if we work together?

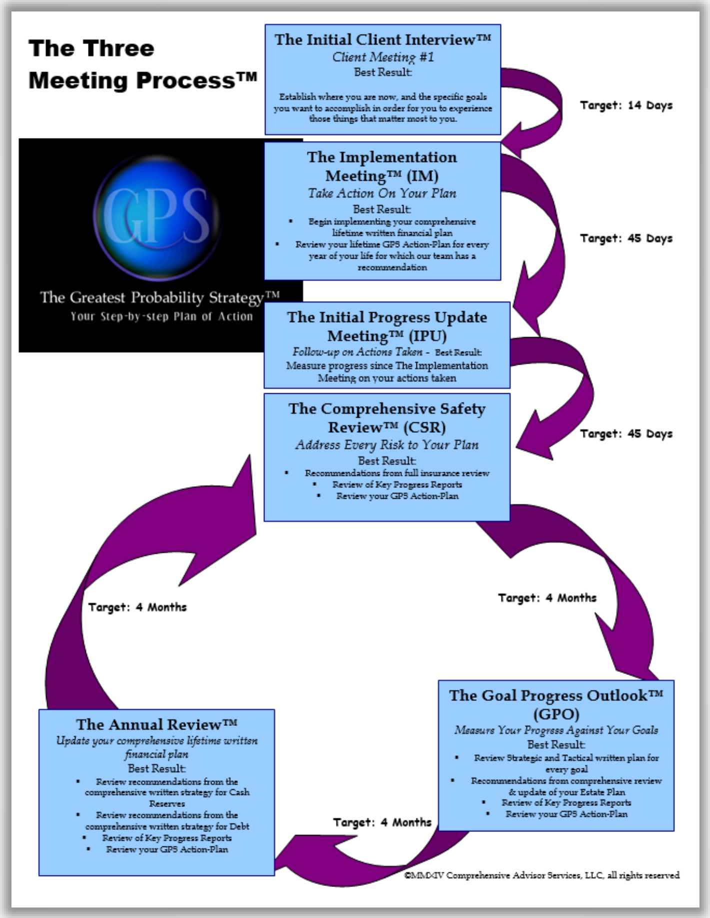
The Three Meeting Process™

We will meet at least once every 4 months and we'll book all meetings 12-months out.

Truly Comprehensive Financial Services™

We'll coordinate all your personal financial affairs

We're the only game in town



What makes you different
than the other 3 Financial Advisors
we’re interviewing?

We're the only game in town

Truly Comprehensive
Financial Services™

We'll coordinate
all your personal financial affairs

Advisor PACT™

I'll make a pledge
to step up and fulfill
The Four Client Expectations™
(aka The Four Advisor
Blind Spots™)

We’re the only game in town

ADVISOR | PACT™

How will you deliver
on the commitments
you’ll make to us up front?

We’re the only game in town

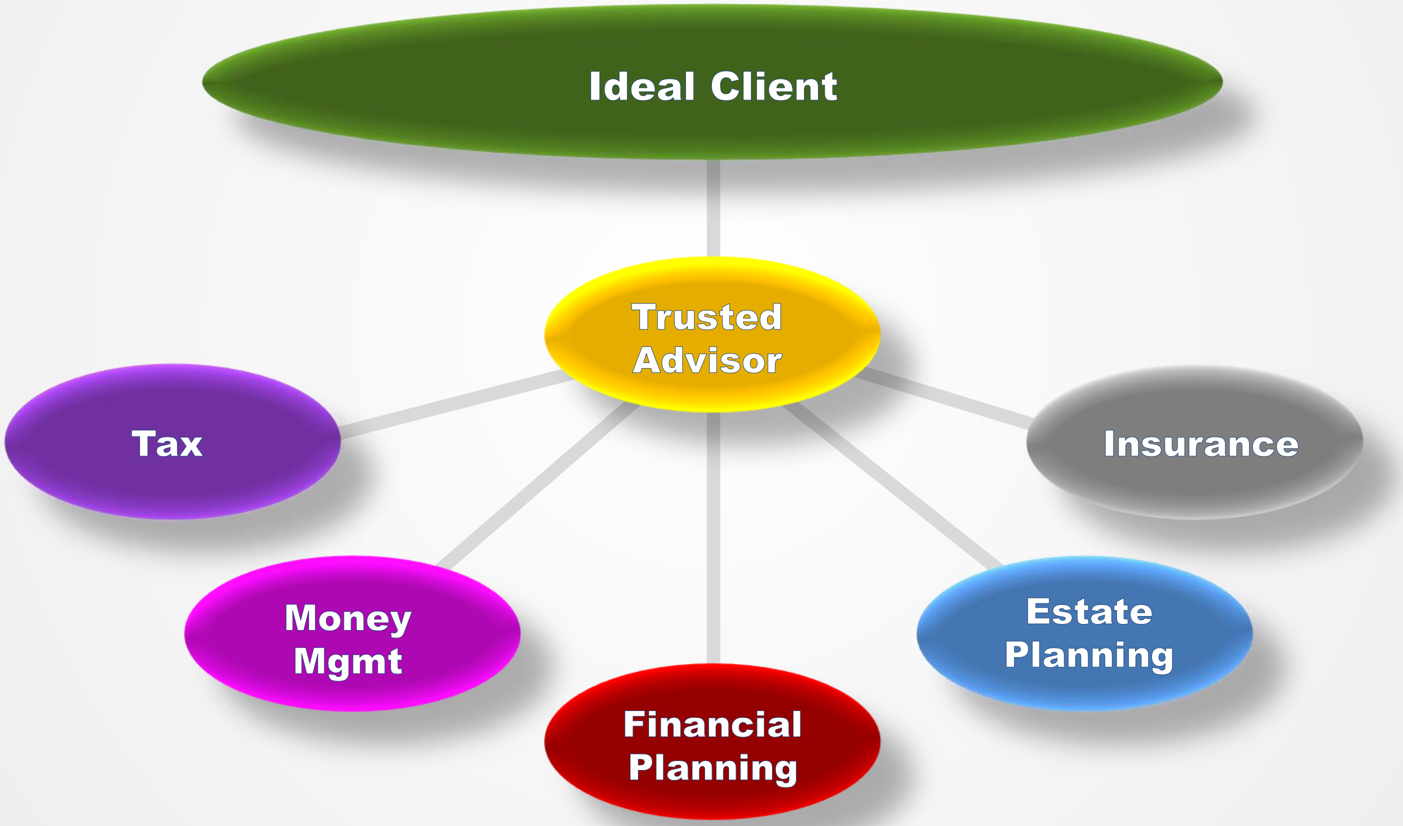
Truly Comprehensive
Financial Services™

We’ll coordinate
all your personal financial affairs

Skilled Team

You will have a skilled team of Subject Matter Experts in every major area of personal finance

We're the only game in town



How will we feel different (better)
because we chose you
over the other Financial Advisors
who are wanting to work with us?

We're the only game in town

The 3 Bottom-line Client Outcomes

1. Always on track
2. No surprises
3. Make better financial decisions

Truly Comprehensive Financial Services™

We'll coordinate
all your personal financial affairs

We’re the only game in town

The 3
Bottom-line
Client Outcomes

1. **Remain On-track To Goals**
2. **Proactive on all financial issues**
3. **Make better financial decisions**
   … in all areas of personal finance

The Three Meeting Process™

We will meet at least once every 4 months and we'll book ass meetings 12-months out.

The 3 Bottom-line Client Outcomes

1. Always on track
2. No surprises
3. Make better financial decisions

Truly Comprehensive Financial Services™

Advisor PACT™

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Spontaneous Unsolicited Client Referrals

June 18, 2019

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Advisor PACT™ Monthly

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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 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.
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...

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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.