



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

February 18, 2020
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.****



Send a voice message to Mark McKenna Little

What's your issue today?
If you could ask just 1 question, what would it
be? Your Biggest Struggle?

Is your microphone ready?

 **Start recording**

1 Record - 2 Listen - 3 Send

Mark McKenna Little

Mark McKenna Little | Founder/Creator | The Mark of Mastery™ For Financial Advisors

www.TheMarkOfMastery.com

<https://themarkofmastery.com/>

advisorpact.me/question

Questions for today's session



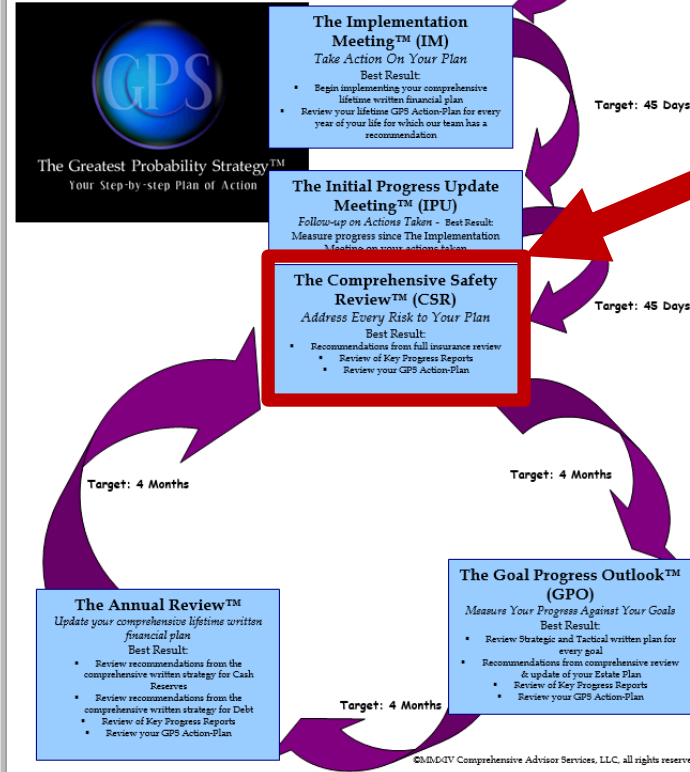
- ✓ I have an Ideal Client who is a worrier. How do I exceed the expectations of a client like this?
- ✓ I have acquired 3 of the 5 SMEs you recommend (FP, Tax, Est Pl), and I am currently handling the money management for the moment. Are there any regular reports I should require from my SMEs?
- ✓ I've heard you say to start exceeding clients' expectations by focusing on the entire experience, even the little things. Like what?

Client Progress Meeting Preparation



- ✓ I have an Ideal Client who is a worrier. How do I exceed the expectations of a client like this?
- ✓ This particular client tells me that he can't sleep sometimes worrying about future financial problems that might happen.
- ✓ I want to ease this client's pain and calm him down since he's currently on track for all the goals he's shared with me and he's good about implementing all the planning advice we give him.
- ✓ How can I help this client get some sleep?

The Three Meeting Process™



The Comprehensive Safety Review™ Meeting

We've developed a **cathartic** exercise which asks your client to share every single thing that worries them.

It's designed to help them get **everything** off their chest.

The Comprehensive Safety Review™ Meeting

It's a simple exercise called
**The Comprehensive Safety
Review Exercise™**
which you'll conduct
at least once annually.

The Comprehensive Safety Review Exercise™

(Instructions: Fill out Boxes in order & do not write ANYTHING in Column 6 until you have completed all the boxes in Column 5 you can think of)

Goal ❶	End Result ❷
<p><i>Actualize my Financial Road Map®</i></p> <p><i>Accomplish my goals by the target dates I've set & experience those things that matter most to me in life</i></p>	

Today's Date ②	Date of Last Goal ②

[illegible]

The Comprehensive Safety Review Exercise™

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Goal ①	End Result ②
<i>Actualize my Financial Road Map® Accomplish my goals by the target dates I've set & experience those things that matter most to me in life</i>	
Today's Date ③	Date of Last Goal ④
What are the risks and obstacles which stand between you and your goals? ⑤	Strategy ⑥

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1 Goal ① <i>Actualize my Financial Road Map® Accomplish my goals by the target dates I've set & experience those things that matter most to me in life</i>	End Result ②
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What are the risks and obstacles which stand between you and your goals? ⑤	Strategy ⑥

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: LYN

Name: TED

Where I Am Today			
Cash Reserves		Growth/Income Assets	
Now	Be	Now	Be
443,619		27,034,100	
Debt		Insurance	
Now	Be	Now	Be
1,517,160		See Insurance worksheet on back of Financial Road Map [®]	

Personal Goal Milestone

Financial Independence
800,000/year (net)
Jan 1, 2015

Happy
Relaxed

Personal Goal Milestone

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

Honored
Relieved

Personal Goal Milestone

Europe w/Grandkids x3
500,000
Aug 15, 2017

Fun
a blast
excited

Personal Goal Milestone

Dream Jacuzzi + Pool
135,000
Nov 21, 2015

Bubbly
Relaxed

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"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
Pleased	Most needs
Buy what I want + need	

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Debt		Insurance	
Now	Be	Now	Be
1,517,160		See Insurance worksheet on back of Financial Road Map [®]	

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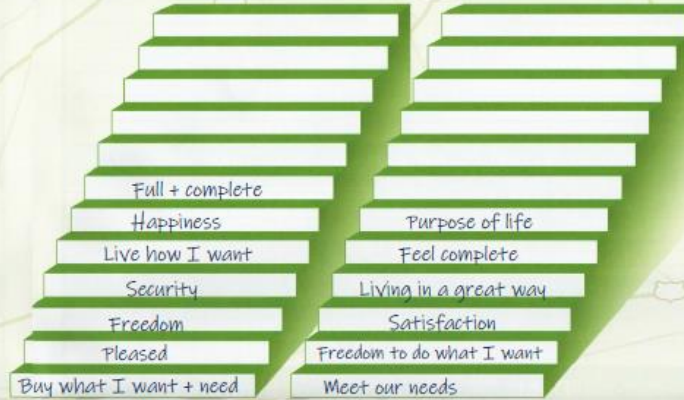
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Cash Reserves		Growth/Income Assets	
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1 Goal ①	2 End Result ②
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What are the risks and obstacles which stand between you and your goals? ⑤	Strategy ⑥

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1 Goal ① <i>Actualize my Financial Road Map® Accomplish my goals by the target dates I've set & experience those things that matter most to me in life</i>	2 End Result ②
3 Today's Date ③	4 Date of Last Goal ④
What are the risks and obstacles which stand between you and your goals? ⑤	Strategy ⑥

The Comprehensive Safety Review Exercise™

(Instructions: Fill out Boxes in order & do not write ANYTHING in Column 6 until you have completed all the boxes in Column 5 you can think of)

1 Goal 1 <i>Actualize my Financial Road Map® Accomplish my goals by the target dates I've set & experience those things that matter most to me in life</i>	2 End Result 2
3 Today's Date 3	4 Date of Last Goal 4
5 What are the risks and obstacles which stand between you and your goals? 5	Strategy 6

The Comprehensive Safety Review Exercise™

(Instructions: Fill out Boxes in order & do not write ANYTHING in Column 6 until you have completed all the boxes in Column 5 you can think of)

1 Goal 1 <i>Actualize my Financial Road Map® Accomplish my goals by the target dates I've set & experience those things that matter most to me in life</i>	2 End Result 2
3 Today's Date 3	4 Date of Last Goal 4
5 What are the risks and obstacles which stand between you and your goals? 5	6 Strategy 6

The Comprehensive Safety Review Exercise™

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Goal ❶	End Result ❷
Actualize my Financial Road Map® Accomplish my goals by the target dates I've set & experience those things that matter most to me in life	<ul style="list-style-type: none"> ▶ Excited, secure ▶ Fulfilled, satisfied ▶ Can really enjoy my life ▶ Can focus on my purpose in life ▶ Relieved, confident ▶ Sleep at night

Today's Date ❸	Date of Last Goal ❹
November 28, 2012	August 15, 2017

What are the risks and obstacles which stand between you and your goals? ❺	Strategy ❻
Both our kids are currently out of work - (may have to help immediately)	<ul style="list-style-type: none"> ▶ Budget \$20,000/mo-immed (\$10,000 for each kid) for up to 3 months ▶ Then \$10,000/mo (\$5,000 for each kid) until they find work (12 months max) ▶ Subject to each kid creating a personal expense projection for the next 12 months
Worry about an economic catastrophe	<ul style="list-style-type: none"> ▶ Continue projecting a 21% decline in the stock market every 3 years (as we've been projecting) ▶ Continue reviewing projections annually & making required course corrections ▶ One year prior to Financial Independence date (1 Jan 2015) make final decision whether margin of safety is enough (before we stop working)
Might outlive our money	<ul style="list-style-type: none"> ▶ Assume we'll spend less than our money is growing each year after Financial Independence (1 Jan 2015) ▶ If ever projections show money exhausted in less than 20 years, after Financial Independence, then tighten belts to eliminate that problem
Cost of living might rise faster than our plan projects (we run out of money)	<ul style="list-style-type: none"> ▶ The strategies above resolve this risk
Health care costs exploding (is that sustainable?)	<ul style="list-style-type: none"> ▶ The strategies above resolve this risk
Will Phil Dodd honor his promise to repay \$604,990 loan by the 30 Sep 2012 due date?	<ul style="list-style-type: none"> ▶ Lynn & Ted will bring all documentation to next meeting ▶ Add this action item to The Greatest Probability Strategy (GPS)



The Best Way of:
Managing The Comprehensive Safety
Review Exercise

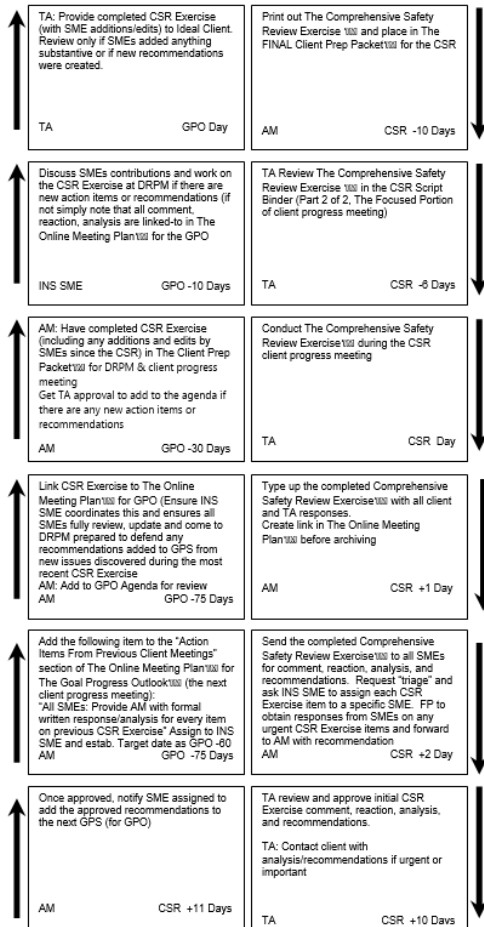
RELATIONSHIP MANAGER
The team member accountable
for this process is:
**Insurance Subject Matter
Expert**

The Relationship Manager will
review & update this process at
this frequency:
Annually

The date of the next review and
update of this process:
1 Jan 2021

**BACK-UP RELATIONSHIP
MANAGER** - The back-up
team member accountable for
this process is:
**Financial Planning Subject
Matter Expert**

DETAILS OF THIS PROCESS
Full detailed steps of this
process are located at (location
of any further details for this
process overview):
**Page below this page
(page down)**



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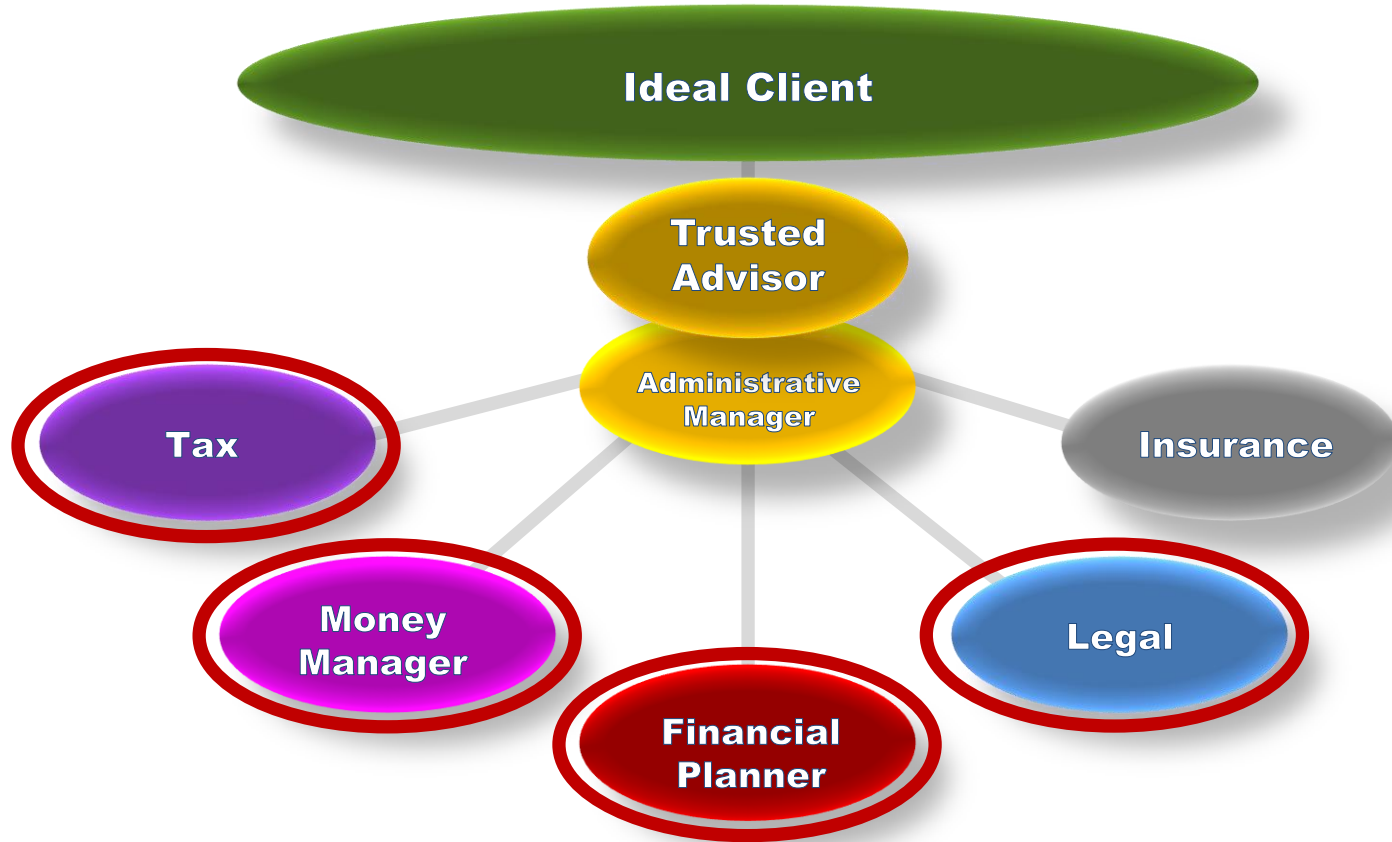
Ideal Client (Lynn & Ted)	Trusted Advisor	Action
Yes. This is good. I am a worrier and I worry about what happens if the future isn't as perfect as you guys are painting it to be and planning on paper.	And that's the point of routinely sitting down, like this, to challenge our assumptions, so that we never have our combined heads buried in the sand. And make no mistake; you are subconsciously aware of risks, unique to your situation, of which our team will be unaware unless we take the time to pry them loose from you. Sometimes seemingly insignificant risks of which only you are aware.	<p>The Comprehensive Safety Review Exercise™ P. 40</p> <p>The Financial Road Map® P. 2</p>
	The whole point is to have enough alternate strategies in place, to address every form of risk we can identify, in order to effectively plan for an uncertain future.	
	It's not even necessary that we identify every conceivable future risk, because that's impossible. The goal is to envision enough risks so that your plan has the greatest probability of success.	
	Let's begin The Comprehensive Safety Review Exercise™.	
	[Hand Lynn and Ted their copy of The Comprehensive Safety Review Exercise™]	
	I've given each of you a blank worksheet; please feel free to take notes on them, if you wish. I'll play the role of scribe" and my Administrative Manager will provide you with a copy of my final version before our next meeting.	
	[Begin with a large sweeping hand gesture over the entire Financial Road Map® ending with a smaller circular gesture over their values]	
	First let's agree that your goal is to make your Financial Road Map® a reality so that you can experience those things that matter most to you – which are your values.	

Client Progress Meeting Preparation



- ✓ Over the past 6-months I have acquired 3 of the 5 SMEs you recommend (FP, Tax, Est PI), and I am currently handling the money management for the moment.
- ✓ All of my SMEs are contract labor, so they have their own firms serving their own clients, and I've hired them to serve my Ideal Clients within their area of specialization.
- ✓ I have lots of software, should I ask them to use my software, or their own?
- ✓ Are there any regular reports I should require from my SMEs?

Our Deliverables Team Structure



SME Requirements

Impose as **few** new things on your
SME as possible.

Let them use their **own** software

SME Requirements

Ask each SME to...

- ✓ Merge their process into **The Three Meeting Process™**
- ✓ Attend a Dry-Run Prep Meeting™ prior to **every** Client Progress Meeting
- ✓ We do ask that **each SME** create a single simple summary report that we've designed.

SME Requirements

The **Five** Critical Reports™
(One for each SME)

Our Deliverables Team Structure



1. Financial Planning Subject Matter Expert

The Goal Blueprint™



Ideal Client: Lynn & Ted Smith

Goal #2: Help Family Fund (Ahead-of-schedule) \$100,000/yr net (2008 \$) Jan 1, 2015

PHASE I

Accumulation Strategy:

- ▶ As of this date, \$1,614,100 has been earmarked of the \$3,258,350 required to fund this goal
- ▶ Contribute the max to all tax advantaged accounts + add additional deposits, as directed into to the Smith Trust

Accumulation Tactics:

- ▶ To fully fund this goal in 2012 contribute \$20,500 to each of your 401k Company retirement plans and \$6,000 into each of your Individual Retirement Accounts (the max allowed)
+ add additional deposits totaling \$1,508,100 into to the Smith Trust

	Ted's 401k	Ted's IRA	Lynn's 401k	Lynn's IRA	Smith Trust	Total
2013	\$20,500	\$6,000	\$20,500	\$6,000	\$754,050	\$807,050
2014	\$20,500	\$6,000	\$20,500	\$6,000	\$754,050	\$807,050

PHASE II

Distribution Strategy:

- ▶ At the beginning of each year, assess the need for the year's funds available for helping the family
- ▶ Take distributions & never run out of money
(at least to age 105 and never any problems for "the next 20 years" ... at all times)
- ▶ If total of your combined growth assets drops by more than 20% in any 12-month period we will recommend a reduced annual distribution (recalculated annually) as a "belt-tightening" safety measure until values rise again
- ▶ Strategy for the order of distributions:
 - Distribute from Smith Trust first each year up to target
 - If needed, distribute from retirement accounts in this order up to targets: Ted's 401k, then Lynn's 401k, then Ted's IRA and then Lynn's IRA

Distribution Tactics:

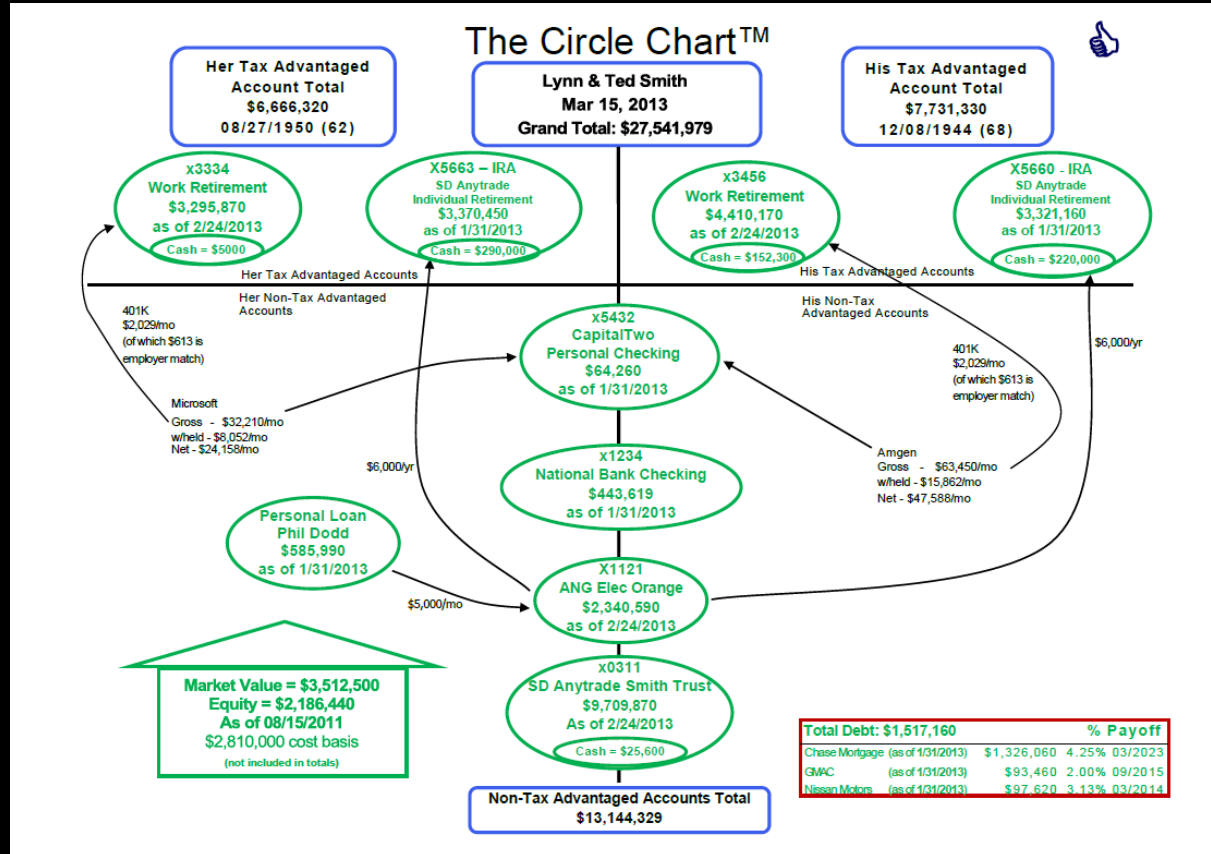
	Ted's 401k	Ted's IRA	Lynn's 401k	Lynn's IRA	Smith Trust	Total
2015	\$0	\$0	\$0	\$0	\$115,000	\$115,000
2016	\$0	\$0	\$0	\$0	\$118,845	\$118,450
2017	\$0	\$0	\$0	\$0	\$122,000	\$122,000
2018	\$0	\$0	\$0	\$0	\$125,660	\$125,660
2019... & thereafter See complete schedule	\$0	\$0	\$0	\$0	\$129,430	\$129,430

Analysis prepared by: Frances Planner

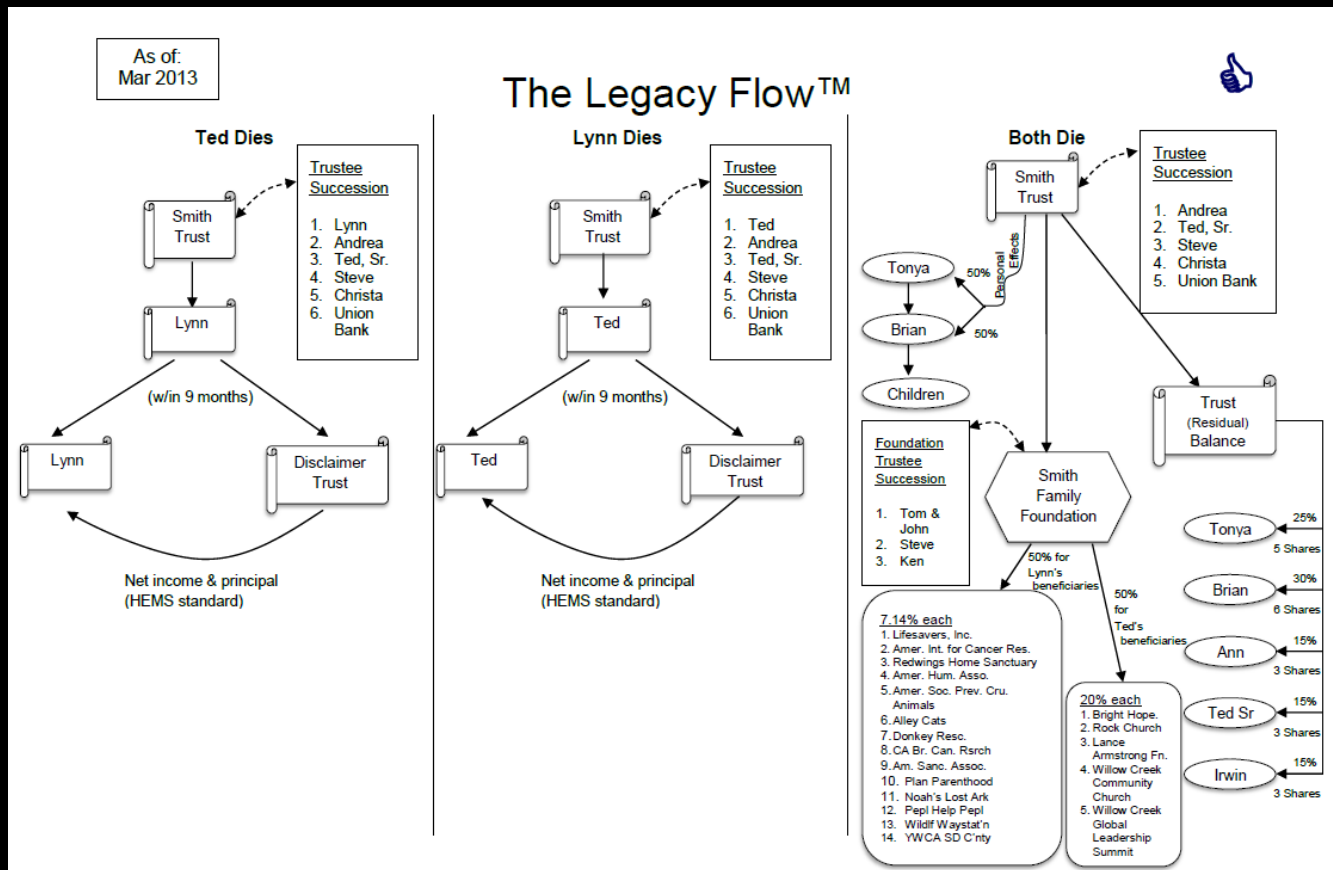
Updated: Feb 28, 2013

Updated
At least
once
Annually

2. Money Management Subject Matter Expert



3. Estate Planning Subject Matter Expert



Updated
At least
once
Annually

4. Tax Planning Subject Matter Expert

The Annual Tax Projection™					
	Lynn	Ted	Totals		
Income					
Wages, Salaries*					
Interest (taxable & tax exempt)*					
Dividends: Ordinary, qualified, franked, un-franked*					
Net Capital Gain or loss*					
Taxable-refunds, credits, tax offsets*					
Retirement account distributions-taxable withdrawals*					
Taxable Pensions & annuities*					
Rental real estate property, royalties, partnerships, trusts*					
Income (or loss) from a business*					
Farm or ranch income or loss*					
(Primary production or Non-primary production)					
Taxable Government benefits (entitlement compensation)*					
Other Taxable Income*					
Total Income					
*See attached detail if applicable					
Adjustments to Income					
Deductible Expenses (see attached detail)					
Total Adjustments					
Income for tax purposes (Income after adjustments)					
Tax & Credits directly reducing tax					
Tax					
Tax Credits reducing taxes due (see attached detail)					
Other Taxes					
This is your Total Projected Tax					0
(Tax after credits)					
Tax Payment Schedule					
These taxes are due in the following month(s)					
	[Month taxes are due]	[Month taxes are due]	[Month taxes are due]	[Month taxes are due]	Totals Due
Ted's Outstanding Tax Liability/(Refund) Installments					
Lynn's Outstanding Tax Liability/(Refund) Installments					
Combined Totals					

Updated
Annually

5. Insurance Subject Matter Expert

Client: Lynn & Ted Smith

Updated: 11/19/12

The Insurance Grid™

Type of Insurance	Institution Name	Policy Number	Effective Date	Maturity Date	Premium	Freq	Deductible	Cover Amounts	Comments
Auto									
370Z -	State Insure Walter Waggener 780-931-5000	171-0-C05-55A	05/09/12	05/03/13	\$ 4,450.69	Semi	\$5000 - Comp \$10,000 - Coll	BI/BI/PD 250k/500k/100k; 5k - Med Un/Underinsured 250k/500k emerg rd srvc; car rent - 80%/day	BI = Bod Inj; BIT = Bod Inj Total; PD = Prop Damg max rental and travel exp = \$1k
Saturn -	State Insure	171-7-C05-55	05/09/12	05/03/13	\$ 3,380.94	Semi	\$5000 - Comp \$10,000 - Coll	BI/BI/PD 250k/500k/100k; 5k - Med Un/Underinsured 250k/500k emerg rd srvc; car rent - 80%/day	BI = Bod Inj; BIT = Bod Inj Total; PD = Prop Damg max rental and travel exp = \$1k
Homeowner's									
Condessa Court - (Personal Residence)	State Insure	77-N9-12444-7	08/24/12	08/24/13	\$18,240.00	Annual	\$20,000	\$3.82M - dwell; \$2.87M - Pers Prp \$1M - Liab; \$10k - Med; \$10K - other prop	Jewelry - \$1,500 ea; \$2,500 aggregate Cash over \$2,000 excluded Firearms over \$2,000 excluded Software Replacement over \$2,500 excluded Fine Art over \$5,000 excluded
Earthquake	None								
Flood	None								
Umbrella	State Insure	11-A9-2744-6	05/07/12	05/07/13	\$ 4,220.00	Annual		\$2,000,000	Business excluded Recommendations Pending
Life Insurance									
Ted - Lynn -	Colonial Partner Colonial Partner Reliastaf	54816981 54811654 AD211444	01/07/98 01/11/01 12/28/08	Age 100 Age 100 12/28/23	\$ 9,509.64 \$ 120.01 \$ 9,480.00	Annual Annual Annual	your life your life your life	\$500,000 \$20,000 \$2,000,000	Beneficiary - Lynn and then Trust Recommendations Pending Beneficiary - Ted and then Trust 15 year Level Term Recommendations Pending
Long-term Care									
Ted - Lynn -	Providential None	100007848557	08/21/07	None	\$38,830.38	Annual	90 days	\$275 daily 5 year max	Home care benefit; Shared care benefit Recommendations pending
Short-term Disability									
	None								
Long-term Disability									Recommendations pending
	None								
Health	PacificNoCare "Signature Value"	6523499-01	End of Employment				\$20 - copay \$50 - ER copay	all conditions accepted - if covered \$250 hosp copay; \$500 max out of pocket \$5MM - Lifetime coverage	800-624-8822 Group: PCCA; Issuer ID 80840 Foreign Medical Care excluded
Dental	San Diego Self Insured	445266	End of Employment				\$25,000 max/yr		\$20k maxper dependent
Vision	VSP	44-44885	End of Employment				\$50-exam \$150 - Glasses	exam - 12 mth; lenses - 24 mth \$120 for frame	Contacts excluded
Rec Vehicles	None								
Foreign Med/Travel	Pedex	546-1115	12/15/11	12/15/12	140.5	Annual	\$250	\$1M Emergency Medical; Hospital fees Med Evac; Bring spouse to your side	Recommendations Pending

Updated
At least
once
Annually

SME Requirements


The Five Critical Reports™

1. FP: The Goal Blueprint™
2. MM: The Circle Chart™
3. EP: The Legacy Flow™
4. Tax: The Annual Tax Projection™
5. Ins: The Insurance Grid™

The Greatest Probability Strategy™ (GPS) step-by-step implementation plan-of-action.

The Greatest Probability Strategy™ (GPS)

For Lynn & Ted Smith's March 15, 2013 Comprehensive Safety Review™



Action Items for the year 2020

ACTION ITEMS DUE BY JULY 12th:

D. Lynn & Ted – For your information, we have discovered that a consultant, Tom Jones, working with the Team's money manager has been caught embezzling client funds. We want you to know that we have reviewed and reconciled each of your accounts and determined that there was absolutely nothing out of the ordinary going on in your accounts. Please provide Mark any correspondence you may have received from Tom Jones, to include e-mails, brochures, or other correspondence. (5R4)

A. Lynn & Ted – Review The Goal Blueprint™ and inform Mark if there are any adjustments you want to make to your goals. (2T7)

E. Lynn & Ted – Regarding your 2012 federal tax return, please do the following:

- Your CPA, Debbie Lee, has not returned our calls regarding our request to get a draft copy of your federal tax return so we can review it prior to your signing and submission to the IRS. Schedule a phone appointment with Mark, by April 1st, to conference-in Debbie so that she understands what we are trying to accomplish. (4LP)
- Because you upgraded your home heating to a high efficiency furnace in January of 2012, confirm that you have provided Debbie with the receipts for the equipment and labor to take advantage of that year's federal credit program. (4C2)
- You currently have an excess of \$43,670 in Cash Reserves. Transfer this amount from your Money Market acct# x1245 to your Personal Checking acct# x5432. This cash will be used to pay for part of your 2012 federal income tax liability.
- Once your tax return has been reviewed by the Team and finalized by Debbie, write a check from your Personal Checking acct# x5432 in the amount TBD, made out to the United States Treasury, and mail it to the Internal Revenue Service, P.O. Box 1214, Charlotte, NC 28201 no later than April 15th. (5K9)

I. Lynn & Ted - Schedule an in-office appointment with Jones, Johannes, and Joans to conduct a full estate plan review to ensure your estate wishes are up to date and in line with estate tax laws passed in the last couple of years. Mark would like to attend with you, so please coordinate with Monica to have this meeting placed on his calendar.

C. Normally, we recommend having at least a primary and then a contingent "decision maker" named in your Durable General Power of Attorney documents. Discuss with Mark the reasons for only having one "decision maker" named on these documents, and decide, if appropriate, who you would like named as a contingent "decision maker." We recommend that Ted names Tonya and Lynn names Sammy to these positions. (5X9)

NOTE: The action items in this sample bear letters simply for training purposes, and should NOT be included on your final version

Updated
every
4-months

SME Requirements

- ✓ Impose as **few** new things on your SME as possible.
- ✓ Let them use their **own** software
- ✓ But **require** The Five Critical Reports™

Client Progress Meeting Preparation



- ✓ I've heard you say to start exceeding clients' expectations by focusing on the entire experience, even the little things.
- ✓ Like what?



FOUR SEASONS



February 18, 2020

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ADVISOR | **PACT**



Send a voice message to Mark McKenna Little

What's your issue today?
If you could ask just 1 question, what would it
be? Your Biggest Struggle?

Is your microphone ready?

 **Start recording**

1 Record - 2 Listen - 3 Send

Mark McKenna Little

Mark McKenna Little | Founder/Creator | The Mark of Mastery™ For Financial Advisors

www.TheMarkOfMastery.com

<https://themarkofmastery.com/>

advisorpact.me/question

Can You Explain Your 2020 Vision & Goals to Your Team?



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...](#)

You are here: [Home](#) / [Advisor PACT™ Monthly](#)

Advisor PACT™ Monthly

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



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.