

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT Monthly Session™

June 16, 2020 Hosted by Mark Little

Questions for today's session

- ✓ What does it take to achieve above average success as a Financial Advisor in this environment?
- ✓ I'm a newer Financial Advisor, was licensed 2-years ago. Is it possible for Financial Advisors to achieve success anymore?
- ✓ Clients seem more and more drawn to online Financial Services, is there a market for high-end advisors anymore?

I'm new to the business

- ✓ 29 Years old
- Just passed my general securities exam
- ✓ My friends & family are worried I'm in this business (iffy economy... they think I should change jobs)
- ✓ I'm adding new clients but not quickly enough, what more should I be doing?
- ✓ I'm determined to succeed, so what's the first step you think I should take?

Are you a high performance Financial Advisor?

5x more likely to succeed if you have some sort of one-on-one coaching

Create a bias towards Action:

What got done this week?

What do I have to show for the week?

Action is the only thing that matters

Be a high performance Financial Advisor & build a high performance team

"The time to fire a team member is the first time it crosses your mind"

Demand a weekly report from every team member... including yourself (allow the entire team to see these)

Mark, What do you require of Financial Advisors you coach one-on-one?

- A frustrated Veteran Financial Advisor

Mark, When a Financial Advisor doesn't succeed,

- ...are there any common denominators?
- ... Is there anything you often think they should have done differently?

- A frustrated 10-year Veteran Financial Advisor

Obviously, money isn't the most important thing in life, but it's the primary thing we count (measure)

I noticed that clients who feel more financially safe, are more generous

The greater the margin of safety I could help them create ... the more generous they are.

What drives me in this business...

Work/Life Balance isn't realistic while you're in full "Client Acquisition Mode"

Mark, How high should I set my goals as a Financial Advisor?

- A newer Financial Advisor

Most Financial Advisors OVER-analyze things

Most Financial Advisors are getting ready to get ready to implement what we teach

What are you waiting for?

My desire is to encourage you

... not discourage you because you CAN do this

I get frustrated with dabblers

I love Financial Advisors and The Financial Services Industry

That's why I created online programs (to help Financial Advisors from a distance because most aren't ready for accountability)

Strive to become a high performance Financial Advisor

If you seriously want to be a highperformance Financial Advisor, seek one-on-one coaching from someone who already is where you want to be

Complacency is normal in people

But moving forward always requires you to get out of your comfort zone

What's a high performance Financial Advisor to me?

Most Financial Advisors fight to stay in their comfort zone

High Performance Advisor...

- ✓ Not satisfied performing below my potential
- ✓ I don't want to leave money on the table
- ✓ Willing to do the work required to acquire at least one new Ideal Client per month
- ✓ Willing to do make the effort to double revenue from current clients at least every 36 months

So what's next?



To-Do List From This Day Forward

- 1. Just Do It: Action is the only thing that matters
- 2. Be able to explain your vision & goals, with passion, in less than 2 min
- 3. Get out of the office more than 50% of your week
- Jettison people in your life who aren't helping you move forward
- 5. Find an accountability coach who will **NEVER** let you off the hook

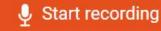


Send a voice message to Mark McKenna Little

What's your issue today?

If you could ask just 1 question, what would it be? Your Biggest Struggle?

Is your microphone ready?



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





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.