



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

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 high-performance 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
4. 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?

 **Start recording**

1 Record - 2 Listen - 3 Send

Mark McKenna Little

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www.TheMarkOfMastery.com

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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.