ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT Monthly Session™

July 21, 2020

Hosted by Mark Little

Questions for today's session

- ✓ What are your critical conversations around The Initial Client Interview™ (The Financial Road Map® Meeting)?
- ✓ I've always heard I should work "on my business, rather than in my business." In your business model, what is the strategic work? ?
- ✓ Will you be continuing Mark's Office Hours, so I can get one-on-one coaching?

What communications
do you have before & after
The Initial Client Interview™
(The Financial Road Map® Meeting)

The 2 rules:

1. Both spouses must be present
2. … with all of their financial documents

3 Communications with Potential Clients

1. Send snail mail appointment confirmation ...re-confirming the 2 rules (which were explained when the appointment was set)
2. Email confirmation to both spouses 2-days prior ...re-confirming the 2 rules
3. Phone confirmation (VM) to both spouses 1 business day prior ...re-confirming the 2 rules

If one of the two
of you is unable to attend,
or if you have trouble finding
your financial documents,
no problem. Just let us know and we'll
reschedule the meeting.

2 Communications with referrer

1. Promptly send handwritten note, thanking for introducing them to me.
2. At the end of the next Client Progress Meeting,
   - ✓ Thank again for the referral(s)
   - ✓ UPDATE: Confirm whether The Initial Client Interview™ has been completed or not.

I've always heard I should work "on my business, rather than in my business." In your business model, what is the strategic work? What are those activities?

My paradigm of success shattered

Start a business & work really really hard

Can you grow 17 years in one afternoon?

Work smarter not harder

So, what is the strategic work ?

What are joint ventures ?

What are mergers ?

Entrepreneurs are excellent problem solvers

You'll have a better business

More interesting conversations

80% of your day strategic work

Will you be continuing Mark's Office Hours, so I can get one-on-one coaching?

ADVISOR PACT

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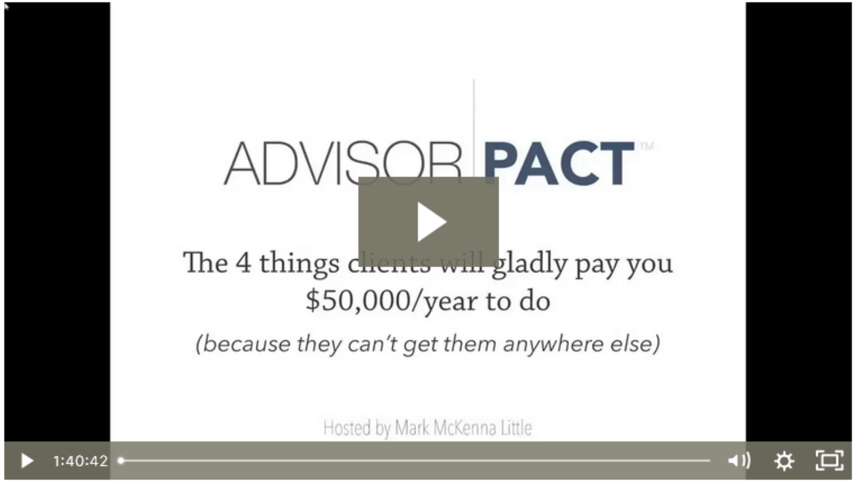
Welcome to Advisor PACT™ Monthly

Congratulations—you've taken the first step towards delivering Truly Comprehensive Financial Services by joining the Advisor PACT™ Monthly program.

First Steps

Before diving into your first module, we recommend reviewing some of the basics of the Advisor PACT philosophy that drives all of our courses and content. Block two hours on your calendar to watch the video below in its entirety, in which Mark walks through the 4 things that every client wants from a financial advisor, but can't find anywhere.



Upcoming Events

Monthly Q & A Session (Jul 2020)
Jul 21, 2020 08:00 AM - 09:00 AM — Webinar

Mark's Monday Office Hours: Drop-in with your questions
Jul 27, 2020 03:00 PM - 04:00 PM

Monthly Q & A Session (Aug 2020)
Aug 18, 2020 08:00 AM - 09:00 AM — Webinar

Monthly Q & A Session (Sep 2020)
Sep 15, 2020 08:00 AM - 09:00 AM — Webinar

Monthly Q & A Session (Oct 2020)
Oct 20, 2020 08:00 AM - 09:00 AM — Webinar

Upcoming events…

News

Replay of June's Group Coaching Webinar
Jun 23, 2020

More news…

Mark's Monday Office Hours: Drop-in with your questions

Q&A session for you to get live one-on-one coaching

- Pacific Time: 3.00p - 4.00p
- Mountain Time: 4.00p - 5.00p
- Central Time: 6.00p - 7.00p
- Eastern Time: 7.00p - 8.00p
- Sydney Aus: 8.00a - 9.00a AEST Tue 28th July

When	Jul 27, 2020 from 03:00 PM to 04:00 PM
Add event to calendar	vCal iCal

Mark Little is inviting you to a scheduled Zoom meeting.

Join Zoom Meeting
https://zoom.us/j/501300736?pwd=ODFURnFLZWRUeGZNTEU2dFoxRkRWUT09

- Meeting ID: 501 300 736
- Password: 2020PACT

[AUDIO] Dial by your location

+1 669 900 6833 US (San Jose)
+1 253 215 8782 US (Tacoma)
+1 346 248 7799 US (Houston)
+1 301 715 8592 US (Germantown)
+1 312 626 6799 US (Chicago)
+1 646 876 9923 US (New York)

Meeting ID: 930 8582 4468

Find your local number: https://zoom.us/u/aW1HuZMn

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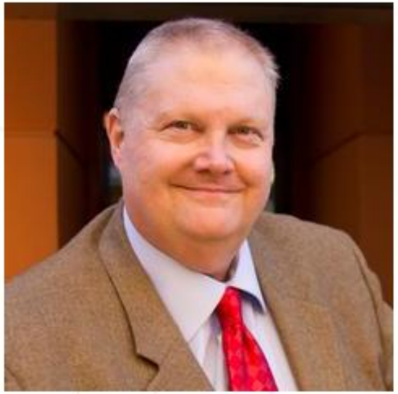
Powered by SpeakPipe



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

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Advisor PACT™ Monthly

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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.