ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT Monthly Session™

August 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.

Questions for today's session

- ✓ I'm new to APM program, what makes this customer service model better and how is it different?
- ✓ Could you review the lolliop organizational structure?
- ✓ You mentioned in previous sessions that I could get it if I need more one-on-one coaching to implement? How much is that?

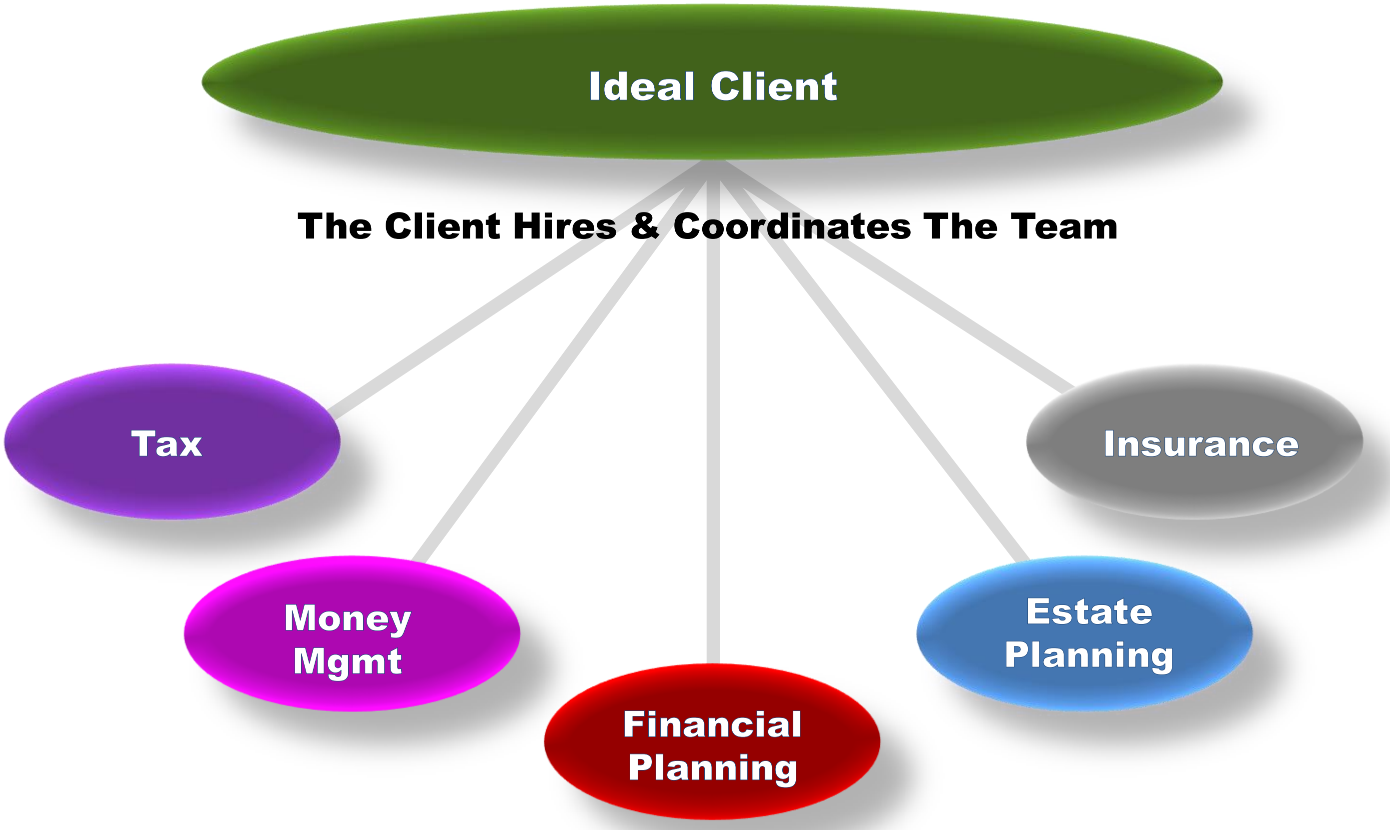
I'm new to APM program, what makes this customer service model better and how is it different?

The Advisor PACT™ Client Service Methodology is the only service model in the Financial Services Industry designed to produce unsolicited client referrals...

1. **STAGE 1**: If you're a start-up Financial Advisor, your initial job is to build your team by filling all five (5) Subject Matter Expert (SME) Vacancies.
2. **STAGE 2**: Once your team is built, your job is to work with your SMEs to deliver what's required until you're consistently exceeding your client's expectations. THEN COMES THE STRATEGIC WORK...
3. **STAGE 3**: Once your team is consistently impressing your Ideal Clients, your job is to begin removing yourself from the day-to-day operations of your business.

Could you please review the lolliop organizational structure?

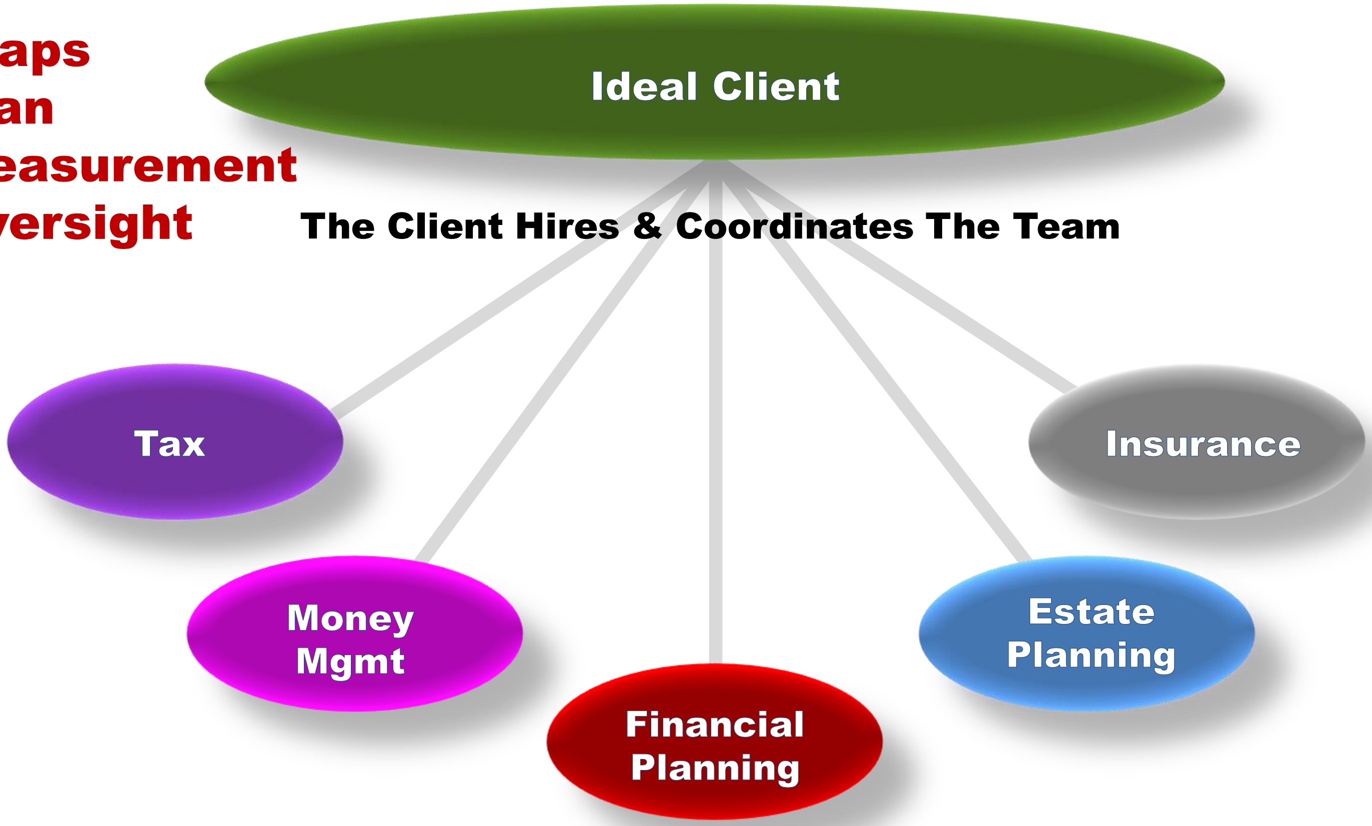
The Traditional Financial Services Business Model



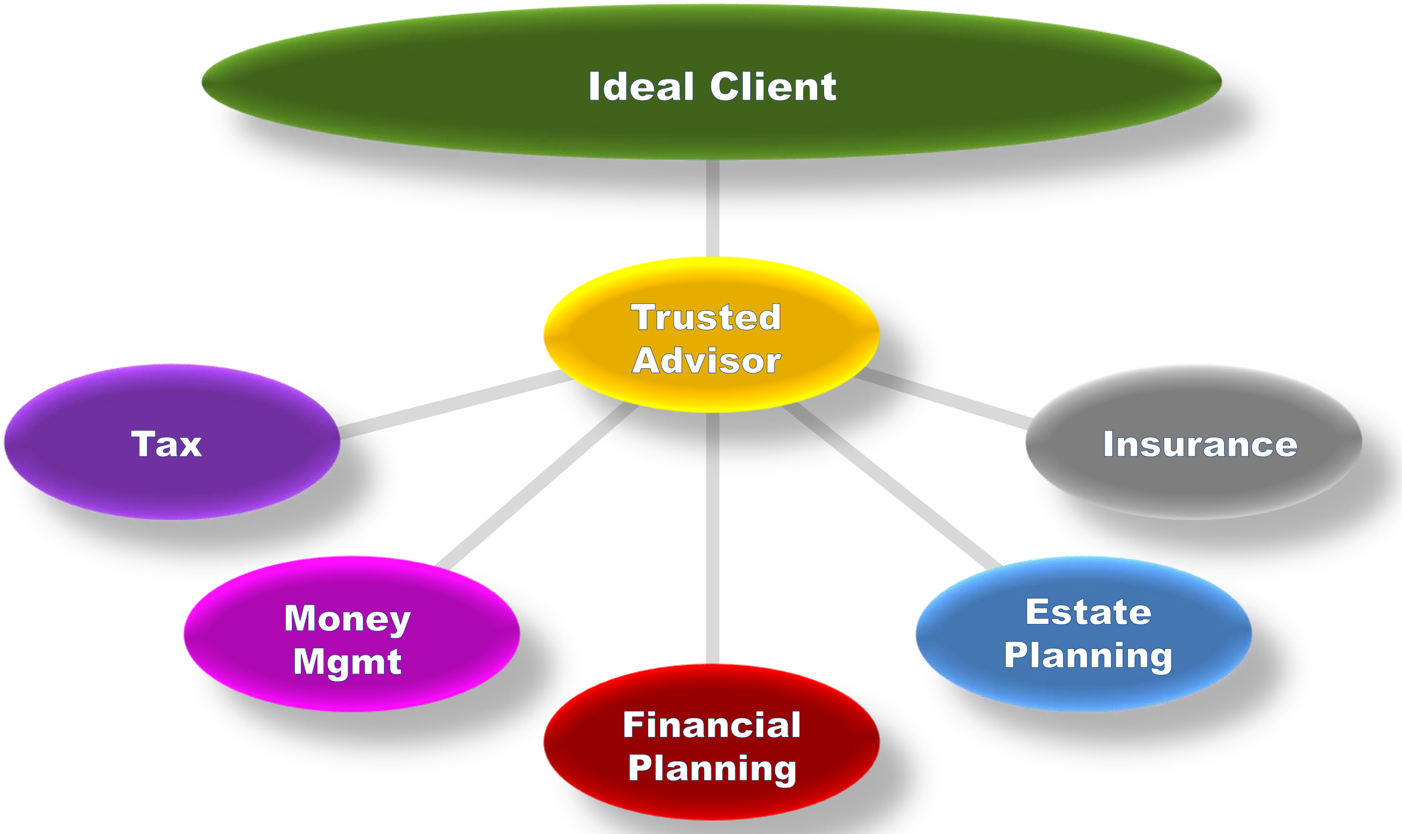
The Traditional Financial Services Business Model

Usual Gaps

- ✓ No Plan
- ✓ No Measurement
- ✓ No Oversight

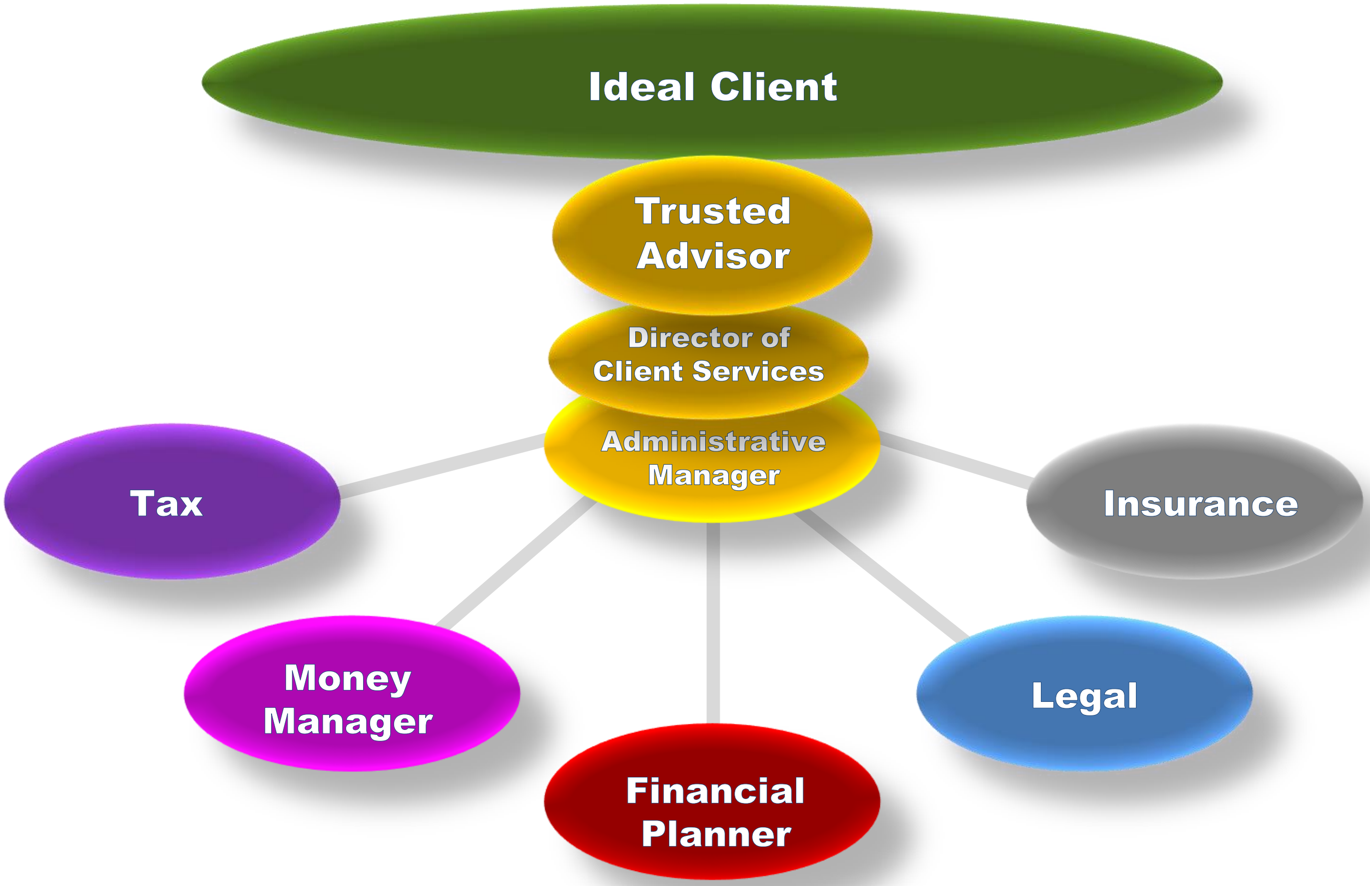


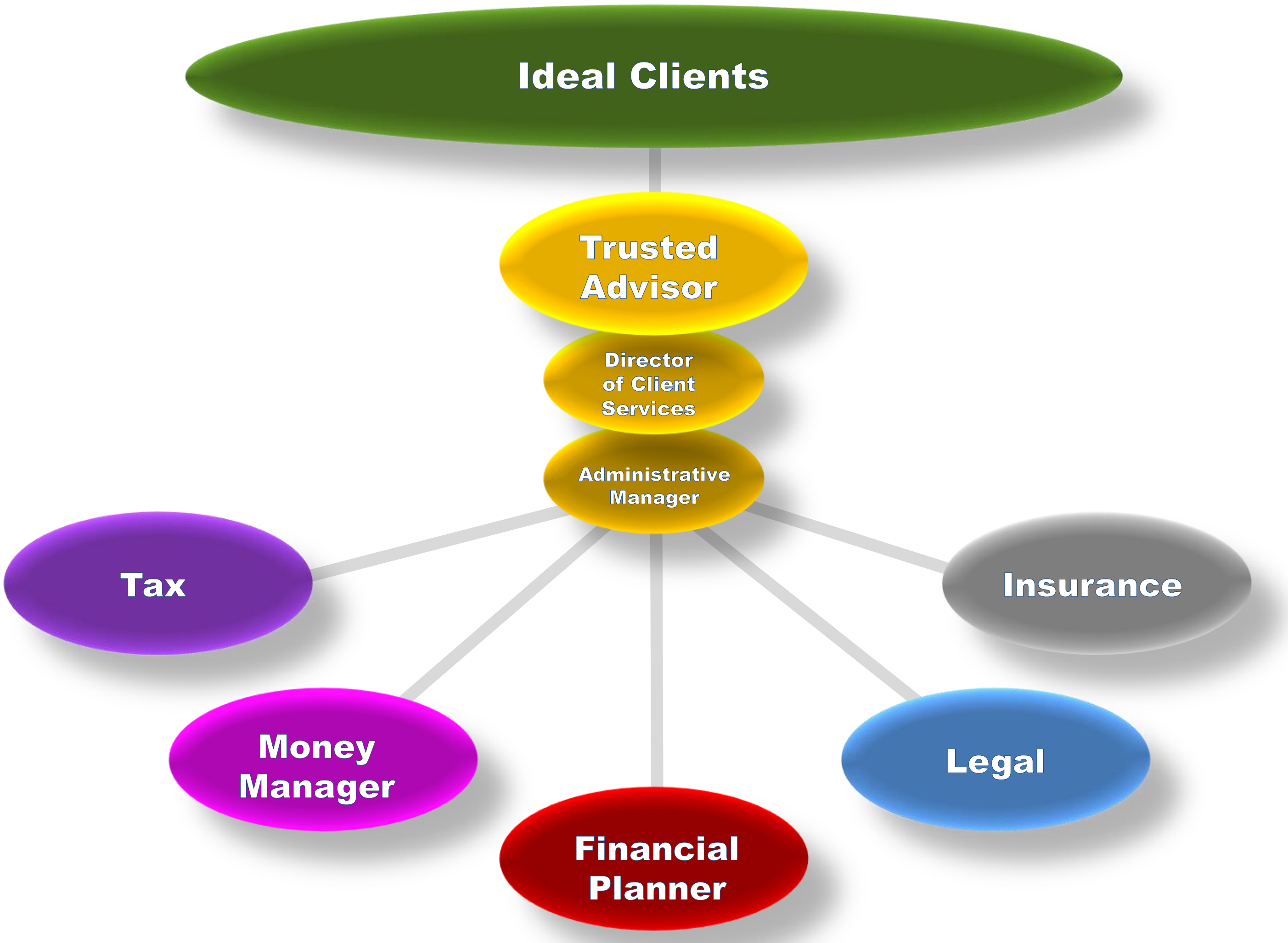
Our Business Model is different

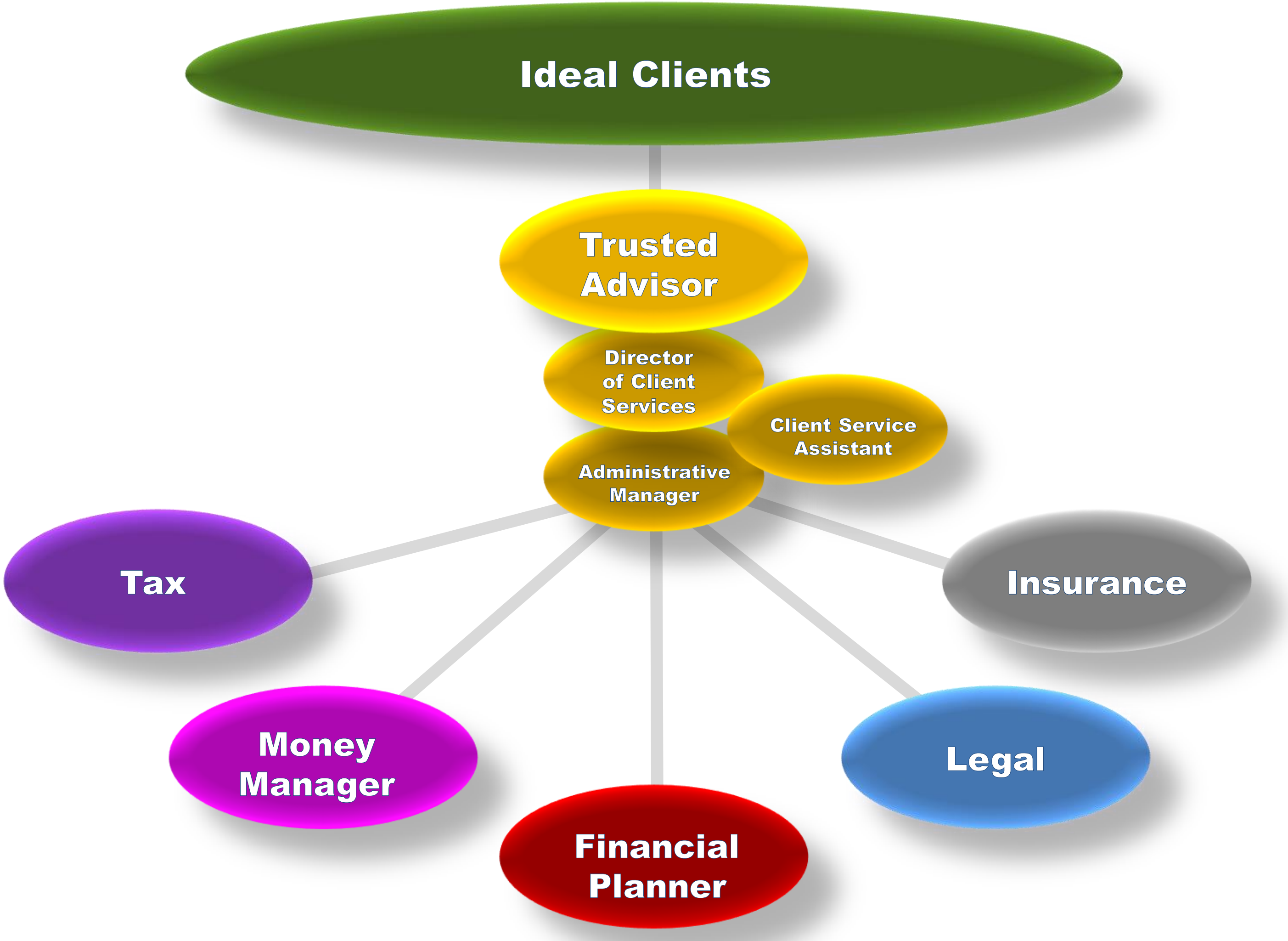


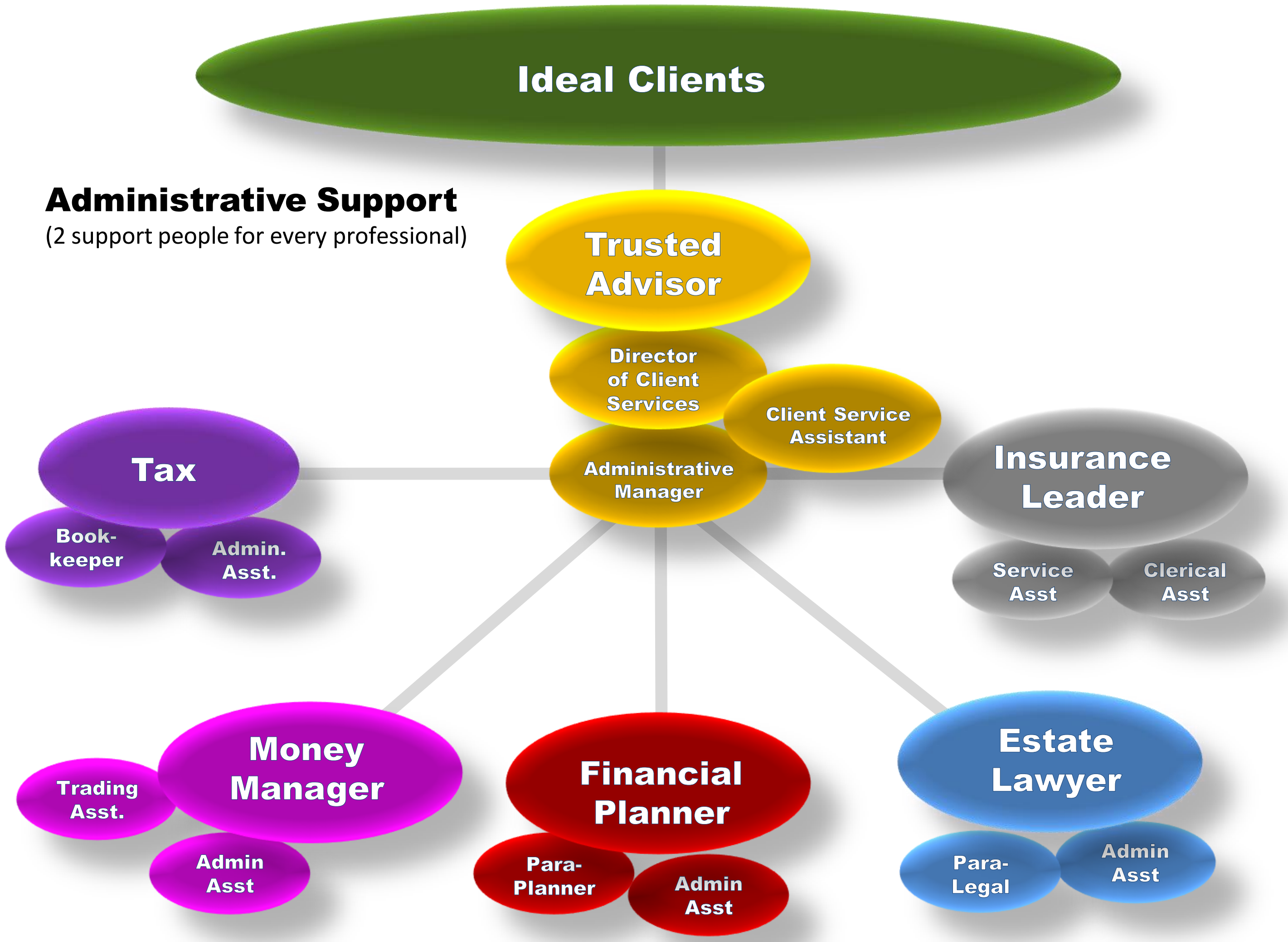
Our Deliverables Team Structure

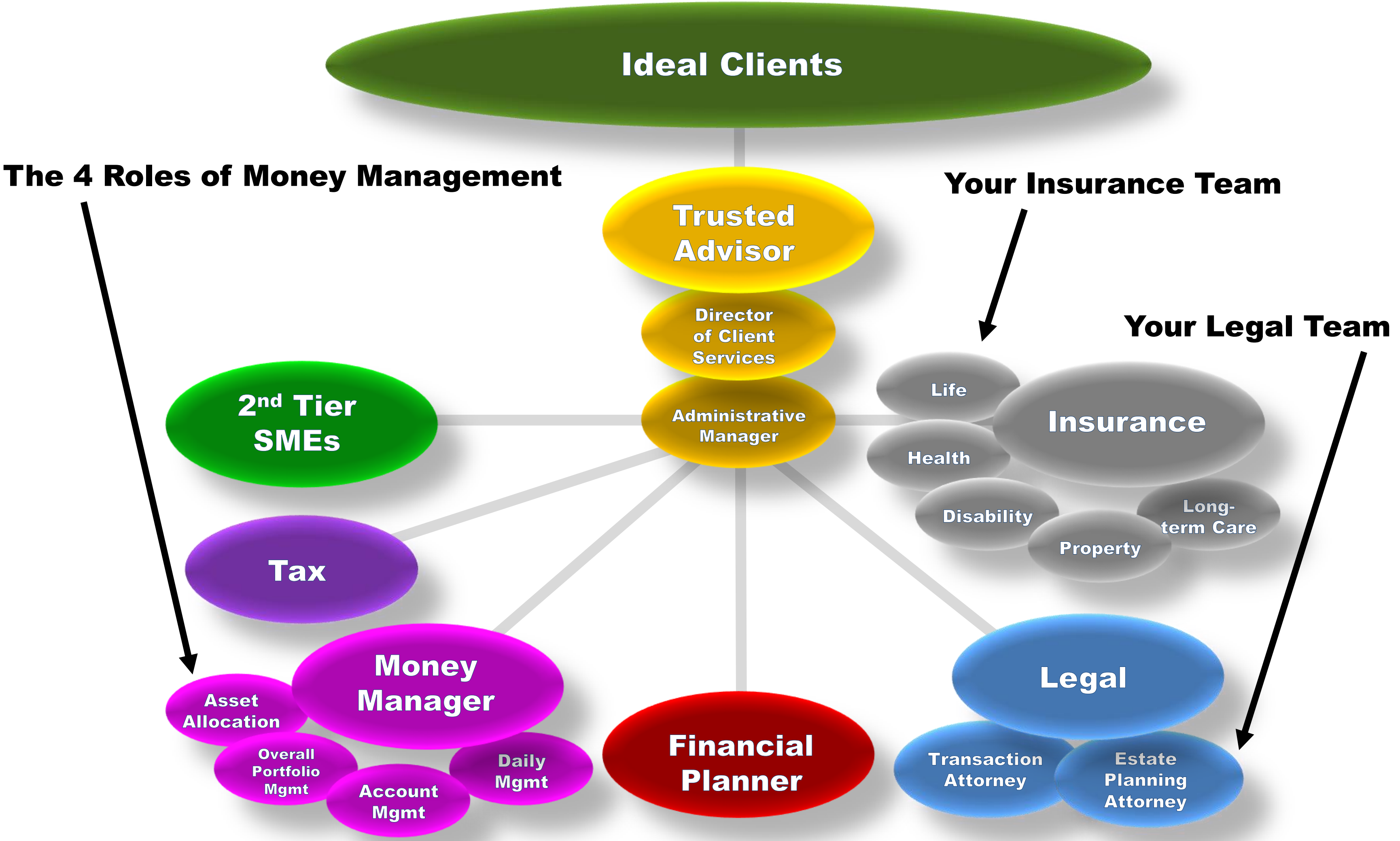
Our Deliverables Team Structure




Ideal Clients
Trusted Advisor
Director of Client Services
Administrative Manager
Tax
Insurance
Money Manager
Legal
Financial Planner

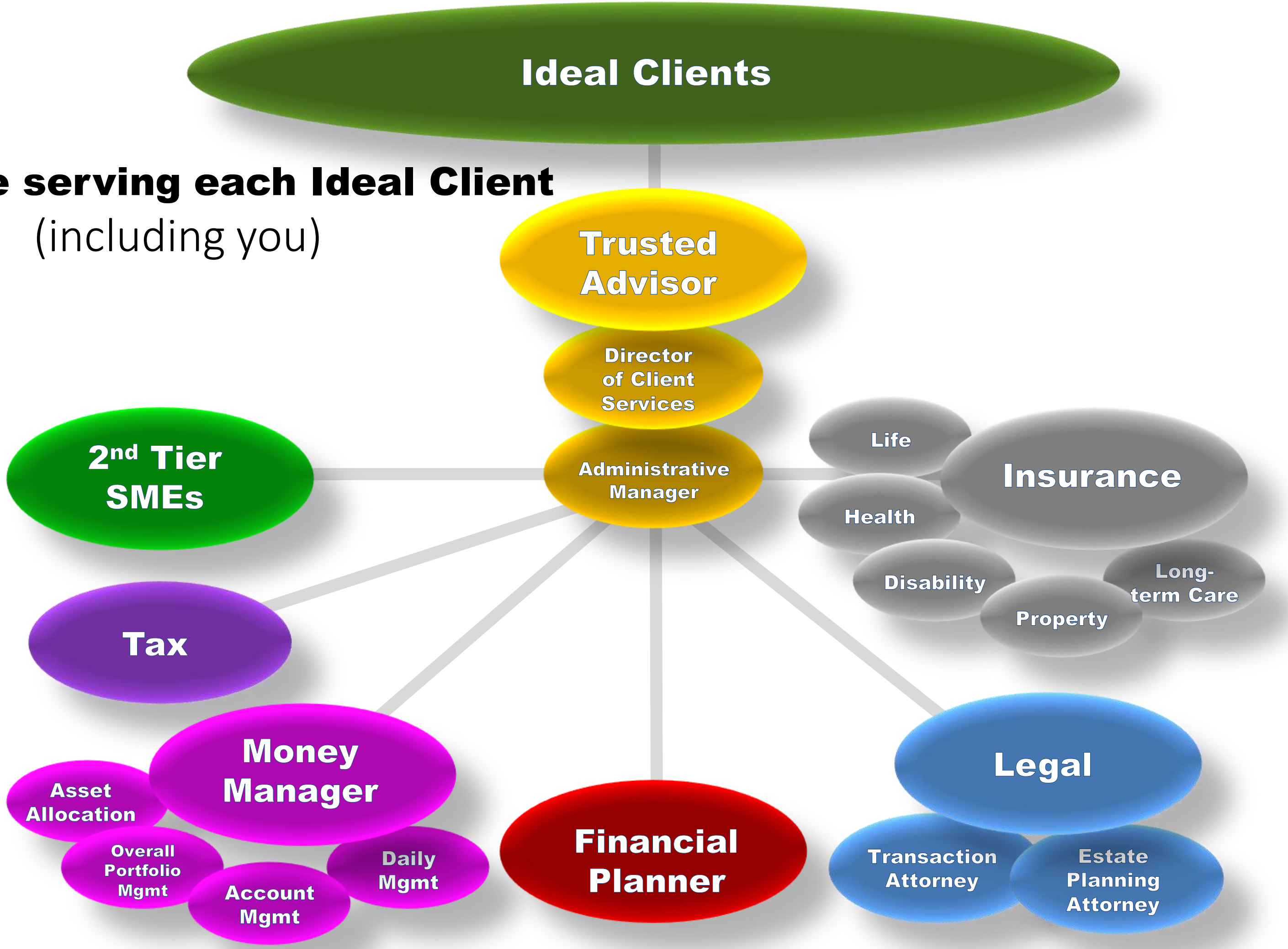

Ideal Clients
Trusted Advisor
Director of Client Services
Client Service Assistant
Administrative Manager
Tax
Insurance
Money Manager
Legal
Financial Planner


Ideal Clients
Administrative Support
(2 support people for every professional)
Trusted Advisor
Director of Client Services
Client Service Assistant
Administrative Manager
Tax
Book-keeper
Admin. Asst.
Insurance Leader
Service Asst
Clerical Asst
Money Manager
Trading Asst.
Admin Asst
Financial Planner
Para-Planner
Admin Asst
Estate Lawyer
Para-Legal
Admin Asst


Ideal Clients
The 4 Roles of Money Management
Trusted Advisor
Your Insurance Team
Director of Client Services
Your Legal Team
2nd Tier SMEs
Administrative Manager
Life
Insurance
Health
Disability
Long-term Care
Property
Tax
Money Manager
Legal
Asset Allocation
Overall Portfolio Mgmt
Account Mgmt
Daily Mgmt
Financial Planner
Transaction Attorney
Estate Planning Attorney


Ideal Clients
3 on your payroll
Trusted Advisor
Director of Client Services
Administrative Manager
26 on your SME's teams
(including support people)
2nd Tier SMEs
Life
Insurance
Health
Disability
Long-term Care
Property
Tax
Money Manager
Asset Allocation
Overall Portfolio Mgmt
Account Mgmt
Daily Mgmt
Financial Planner
Legal
Transaction Attorney
Estate Planning Attorney

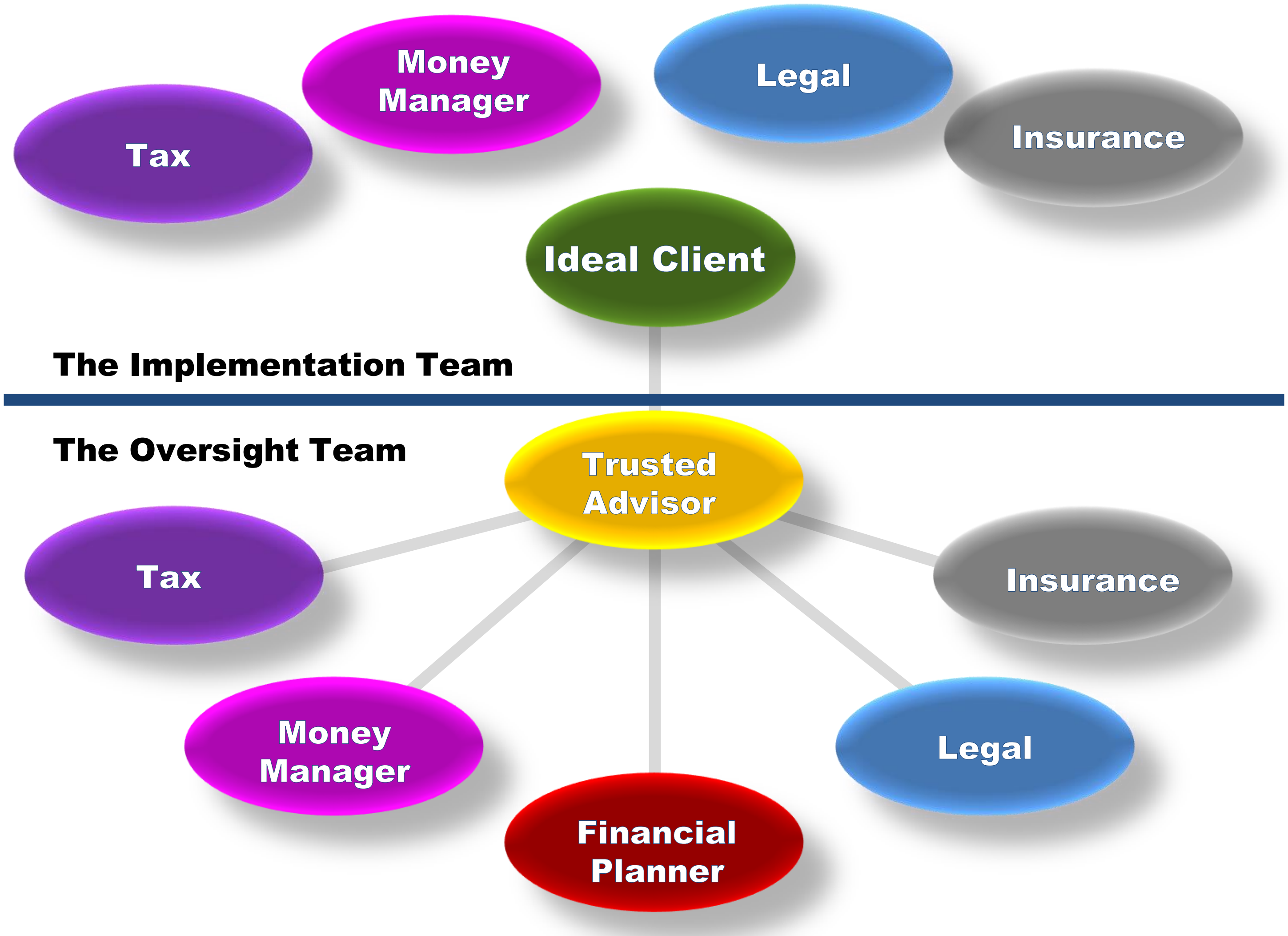
30 People serving each Ideal Client
(including you)

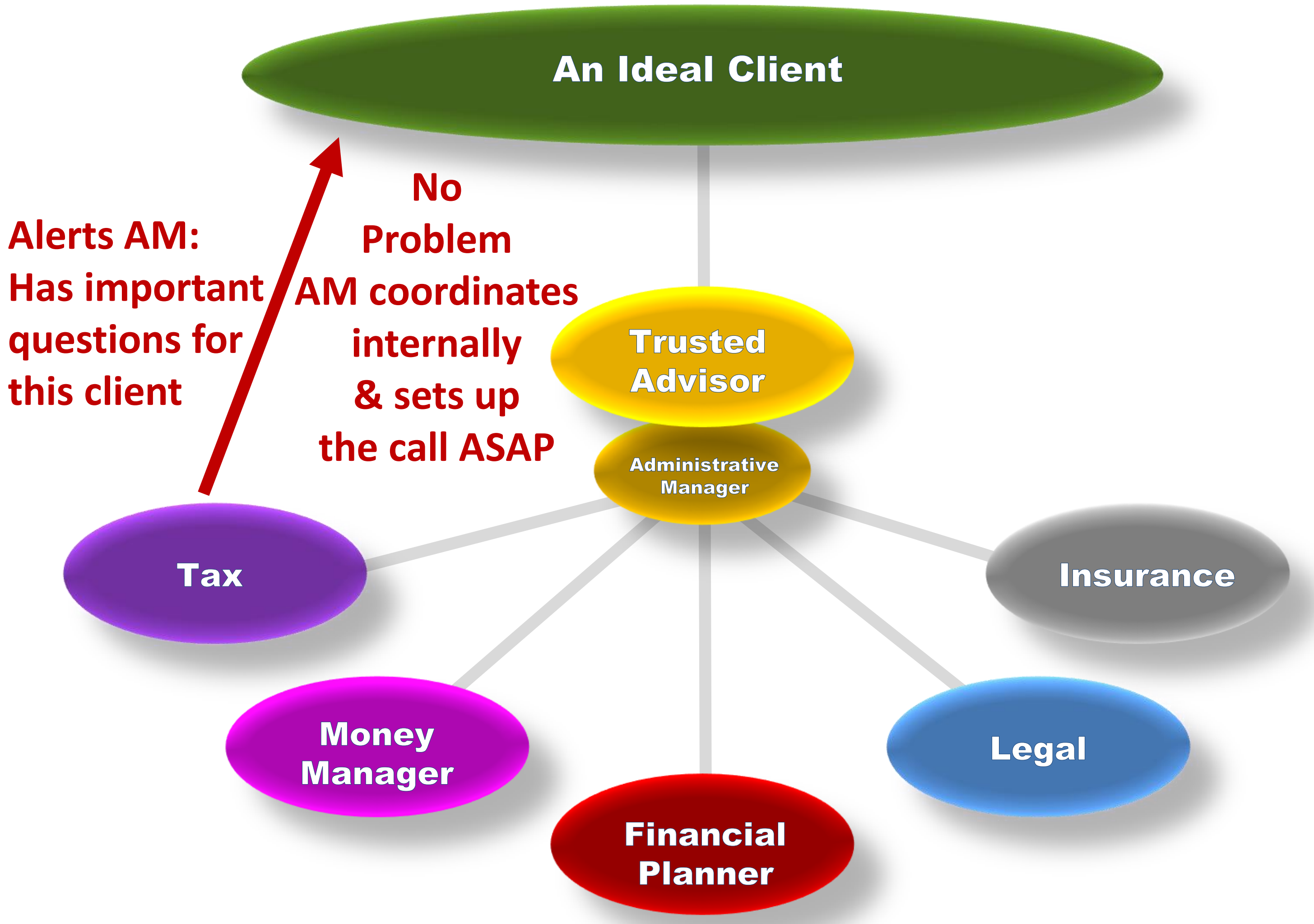


Delivering extraordinary client progress meetings

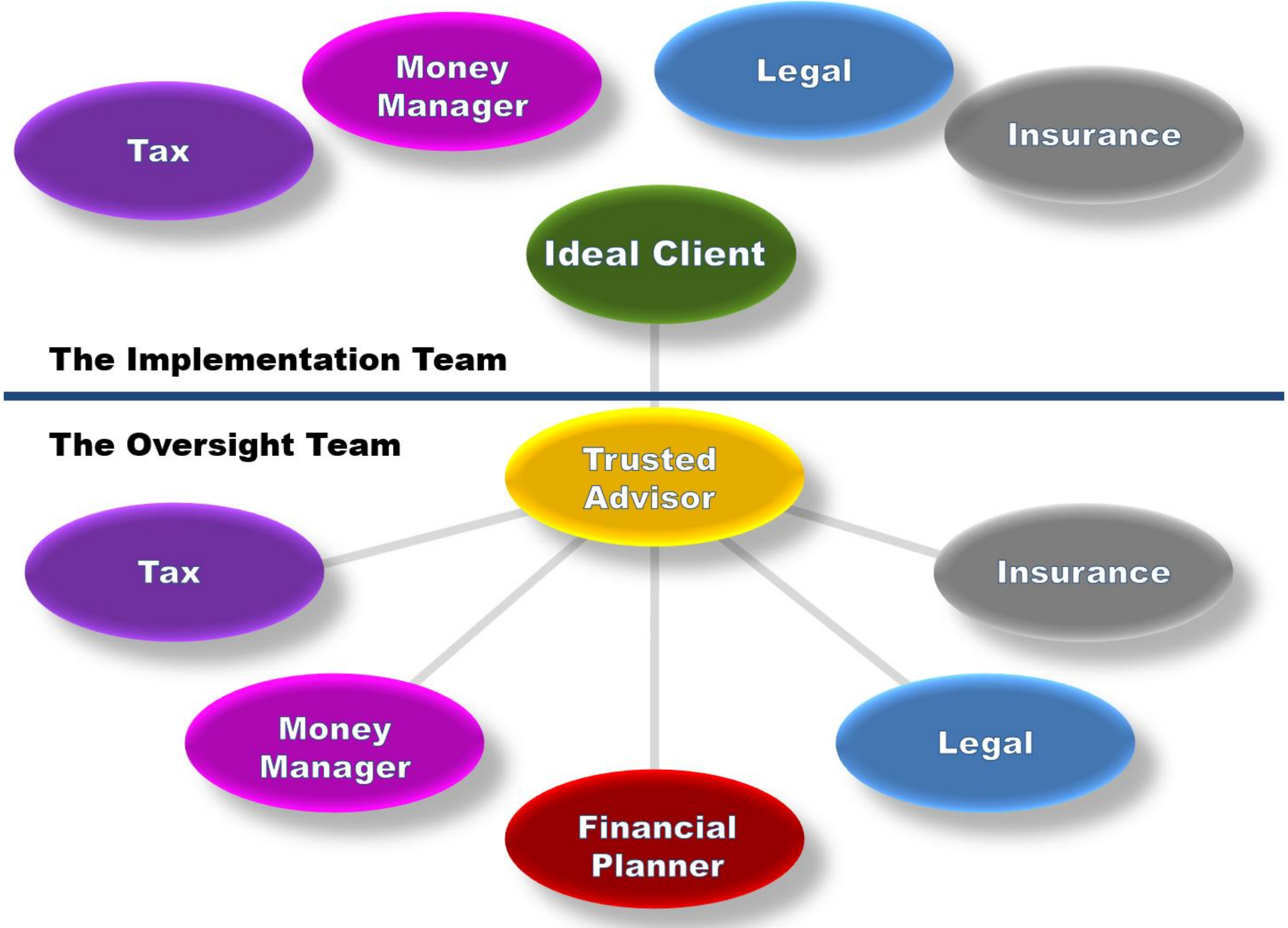
Problem…

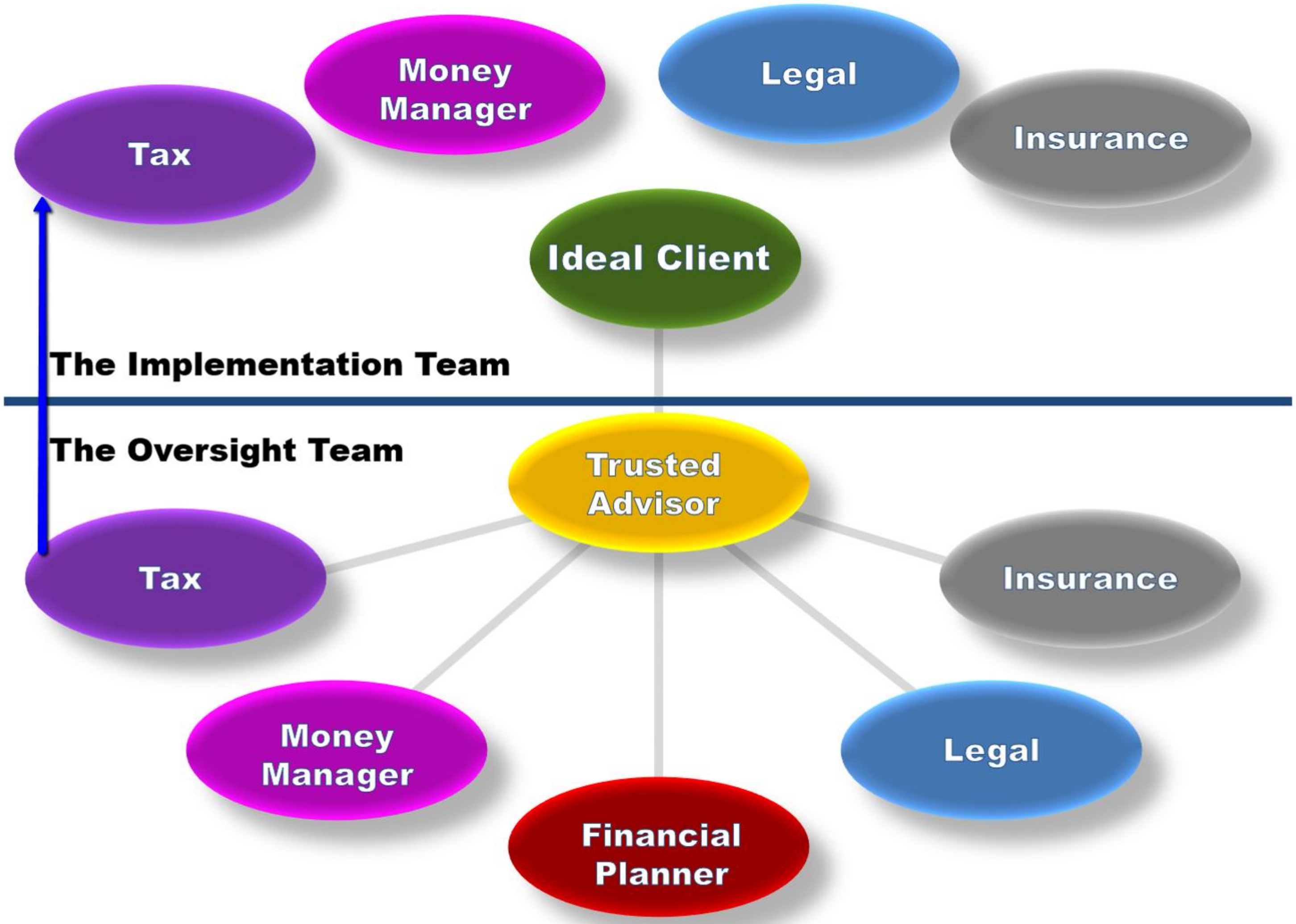
Many clients already have their own people (Tax, Estate Lawyer, etc), what if they don't want to work with my team?

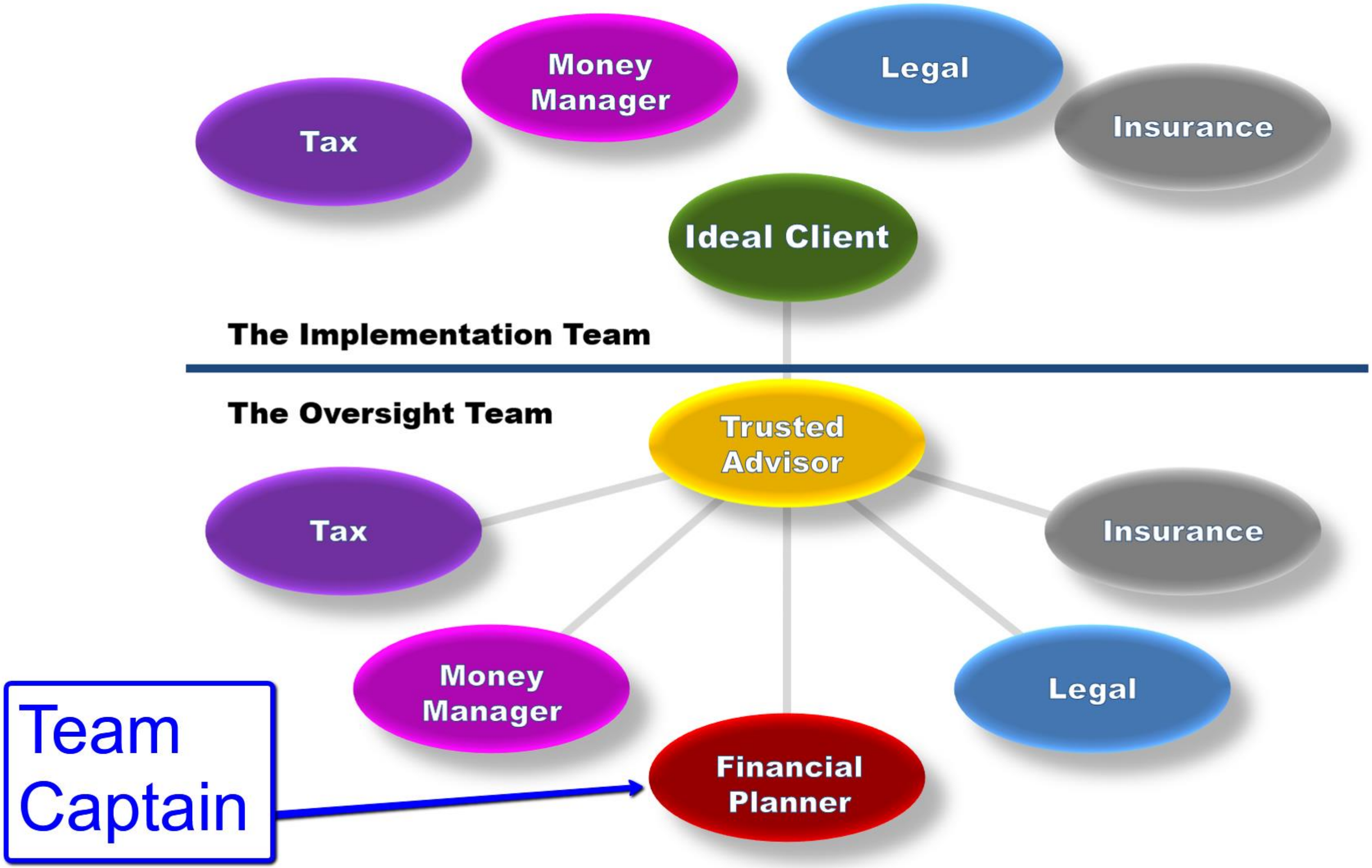

Tax
Money Manager
Legal
Insurance
Ideal Client
The Implementation Team
The Oversight Team
Trusted Advisor
Tax
Insurance
Money Manager
Financial Planner
Legal

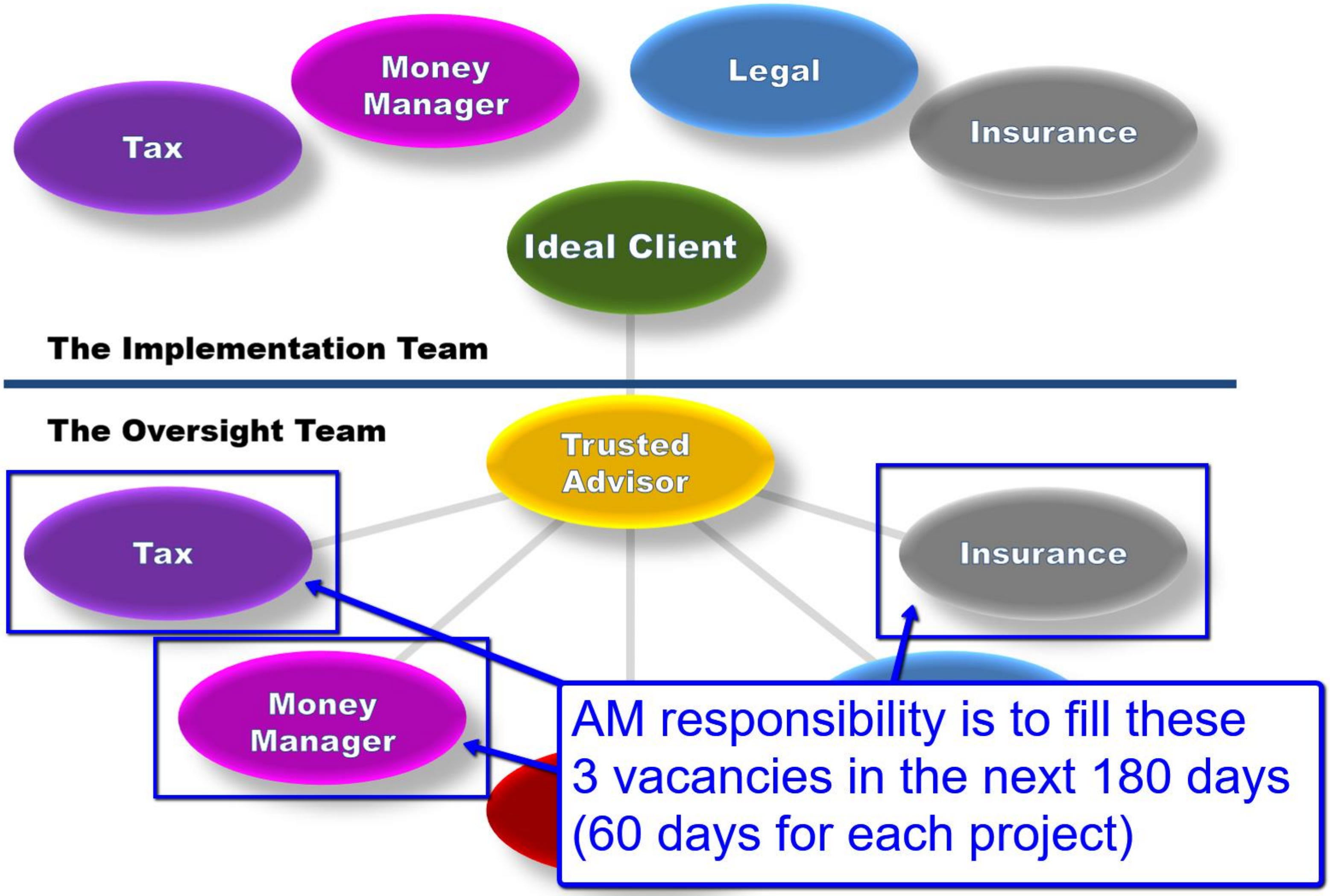


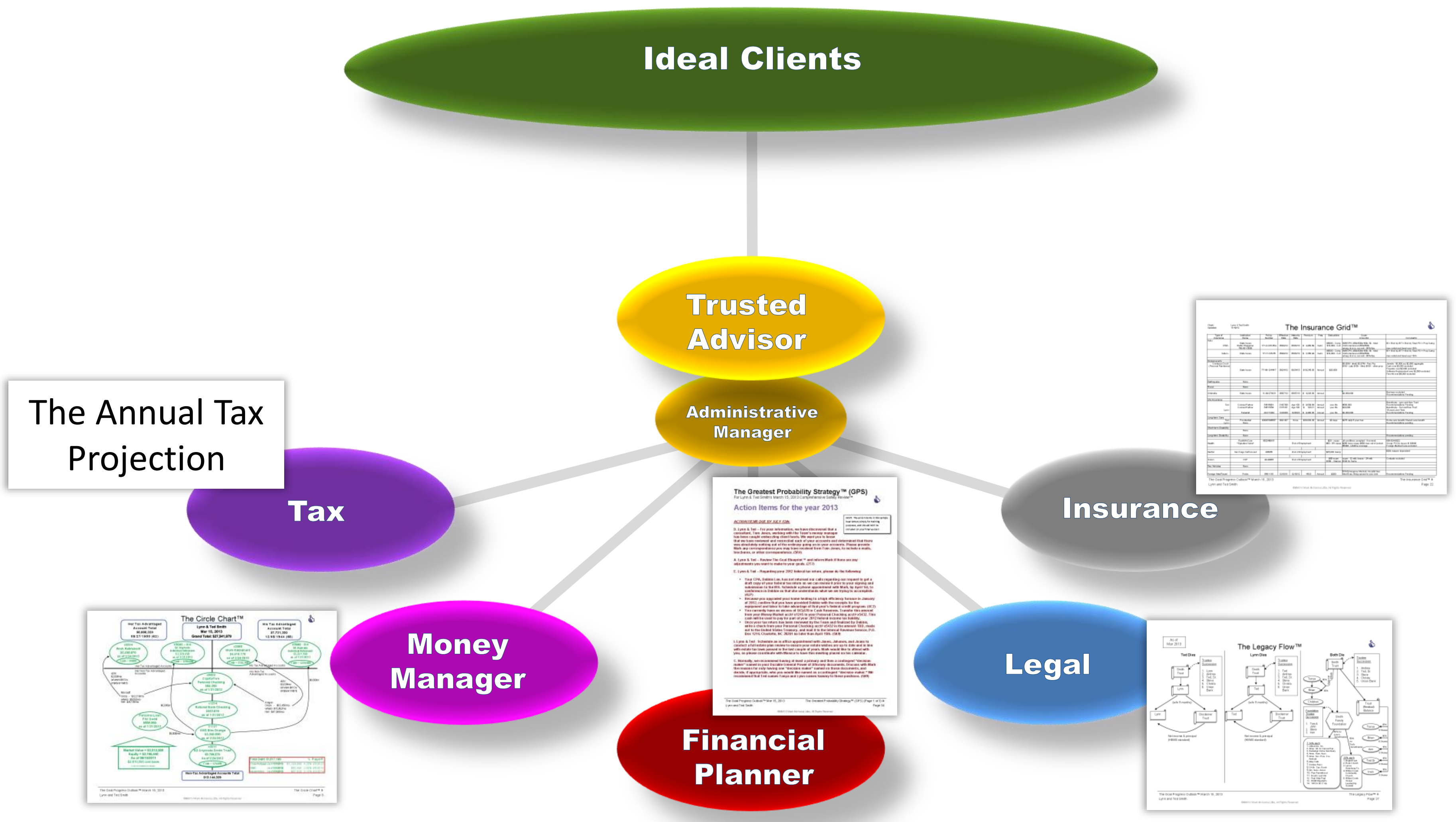
An Ideal Client
Alerts AM:
Has important
questions for
this client
No
Problem
AM coordinates
internally
& sets up
the call ASAP
Trusted
Advisor
Administrative
Manager
Tax
Insurance
Money
Manager
Financial
Planner
Legal


Tax
Money Manager
Legal
Insurance
Ideal Client
The Implementation Team
The Oversight Team
Trusted Advisor
Tax
Insurance
Money Manager
Financial Planner
Legal


Money Manager
Legal
Tax
Insurance
Ideal Client
The Implementation Team
The Oversight Team
Trusted Advisor
Tax
Insurance
Money Manager
Legal
Financial Planner


Money Manager
Legal
Tax
Insurance
Ideal Client
The Implementation Team
The Oversight Team
Trusted Advisor
Tax
Insurance
Money Manager
Legal
Team Captain
Financial Planner


Tax
Money Manager
Legal
Insurance
Ideal Client
The Implementation Team
The Oversight Team
Trusted Advisor
Tax
Insurance
Money Manager
AM responsibility is to fill these 3 vacancies in the next 180 days (60 days for each project)


Ideal Clients
Trusted Advisor
Administrative Manager
The Annual Tax Projection
Tax
Insurance
The Insurance Grid™
The Greatest Probability Strategy™ (GPS)
Action Items for the year 2013
Money Manager
The Circle Chart™
Legal
The Legacy Flow™
Financial Planner

You mentioned
in previous sessions that I could get it if I need more one-on-one coaching to implement?

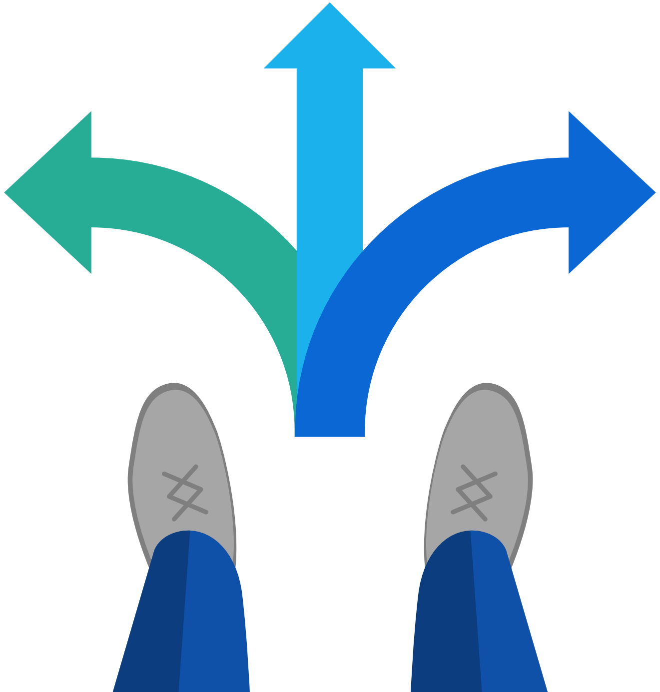
How much is that?

There are 3 Training Paths

Three separate Programs for mastering 3 separate skills

Lead Conversion

The skill of converting a Potential Ideal Client into an actuall paying client in a single 1-hour meeting



Lead Generation

- ✓ Having ample people who ***want to*** sit down with you to "talk business".
- ✓ Every week your schedule is filled with Potential Client appointments
- ✓ Mastering the skill of interacting with people in a way that, if it's a good fit, they'll ***proactively want to*** schedule time to sit down and "talk business" with ***you***

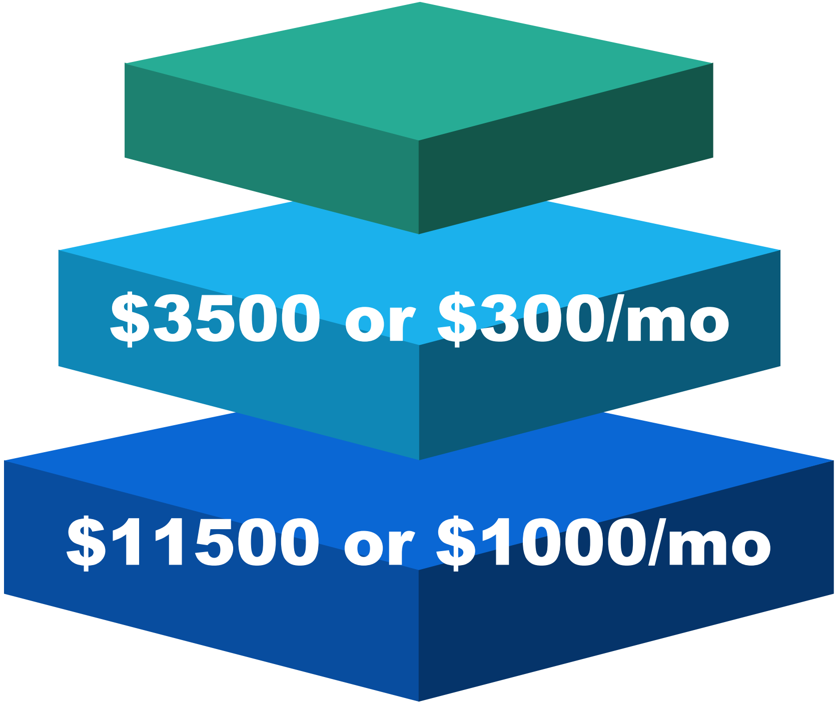
Client Service

- ✓ **Client Satisfaction**: Your team is consistently exceeding Ideal Clients' expectations.
- ✓ **Growth**: Team success and client satisfaction is measured by your client referral rate over the past 12-months.
- ✓ **Profitibility**: Your margins exceed 50% for every Financial Service you provide

- ✓ If ever you decide you want the Client Acquisition module, it's available as an add-on for 50% to existing system users
- ✓ The Greatest Marketing Machine Ever Devised for Financial Advisors (GMME Module) : **$1,400** (which is ½ the regular fee

Each Program Has 3 Levels of Coaching

You get to decide how much one-on-one help you need



Self Paced - do-it-yourselfers

- ✓ ***This is the program everyone starts with*** so you can implement at your own pace.
- ✓ You receive at least one (1) new project each month, in sequence.
- ✓ You have access to one-on-one coaching scheduled every month at ***The Monthly Session™*** (if you participate)

Weekly Coaching program

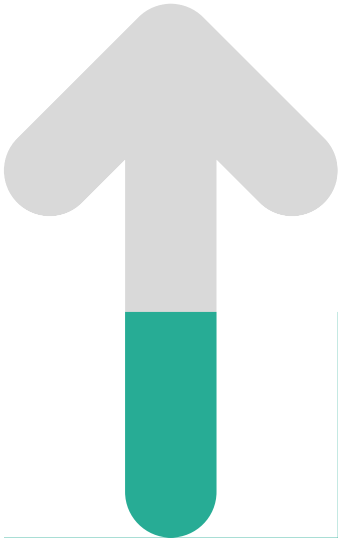
- ✓ In addition to the Self-paced program above, you have access to drop-in sessions to receive one-on-one coaching.
- ✓ At least once every week, you'll be provided access to "***Mark's Office Hours,***"
- ✓ These are drop-in sessions where advisors who have questions can work-through questions & issues faced.
- ✓ First come, first served basis

6-Month Sprint

- ✓ Direct One-on-one Coaching
- ✓ Everything above Plus a weekly one-on-one coaching / accountability session.
- ✓ Every participant is asked to submit a weekly accomplishments report.

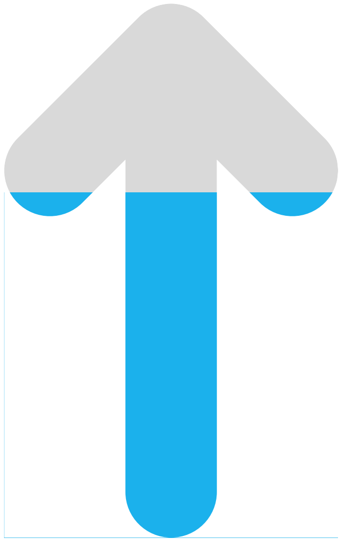
Each Program Has 3 Levels of Coaching

How do I decide which is right for me at the moment?



Self-Paced Program

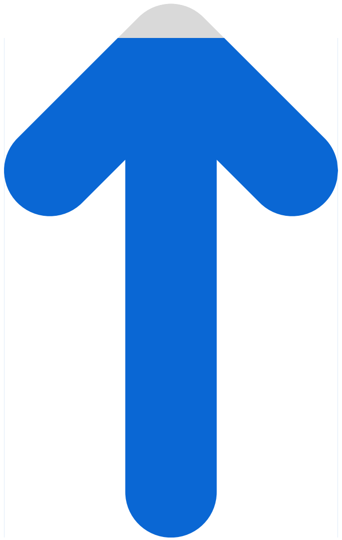
If you're able to implement on-schedule and meet your goals with a single monthly coaching session, ***then remaining in this program is best for you***.



Weekly Coaching Program

If you're not implementing effectively, or quickly enough, then switch to the weekly coaching program. See if more direct-access and more ***one-on-one coaching accelerates your results***.

[NOTE: You may only switch once every 12-months]



6-Month Sprint

You know that feeling when things begin to "click?"

When you feel that you're on a roll and are ready to "jump in the river" fully and sacrifice a bit for the next 6-months, this program is perfect.

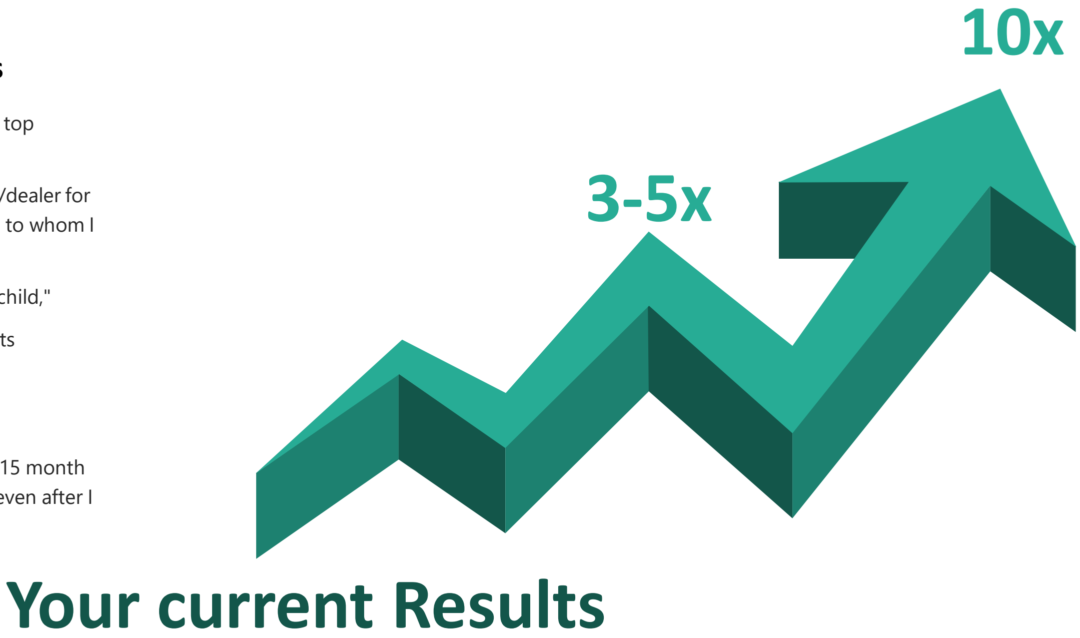
Make it your goal to get more done in 6-months than you have in the last 3-years

Affect of Increased Dedication & Coaching

Expect greater results with increased resolve and one-on-one advice

The top performers have coaches

- ✓ I've been in this industry over 30-years & every top performer I've known has at least one coach.
- ✓ I was the #1 producer at my nationwide broker/dealer for over a decade (until I left)... I've had 4 coaches I to whom I attribute my success.
- ✓ I still hold the record as Bill Bachrach's "poster child,"
- ✓ Moving from 17 Ideal Clients to 100 Ideal Clients
- ✓ Acquiring 83 NEW Ideal Clients in 34 months
- ✓ Increasing revenue from $342k/yr - $1.6m/yr
- ✓ Maintaining an annual client referral rate of 9 -15 month after month... year after year... for many years (even after I stopped accepting new clients)
- ✓ I tell Anne & Bill Bachrach all the time that there aren't many people you can point to and say,
  "*I currently have millions of dollars that are directly attributable to those 2 people*"



Advance to Next Program Only if You NEED It.

Advance to the next level of coaching once you've begun seeing results

6-Month Sprint

Once you're feeling some success and are getting a bit of traction, and you want to seriously ramp-up your results then "Contact Us" and ask to switch to
The 6-Month Sprint: **$11500 or $1000/mo**

Weekly Coaching Program

If you need more coaching in one of the programs, or if you want to accelerate your results, then "Contact Us" and let us know that you want to switch to the
Weekly Coaching Program: **$3500 or $300/mo**

Self-Paced Program

If you're getting the results you hoped for in this program at the speed you wanted, then stay right here in your current program ***... you're doing great.***

If you need to add the Client Acquisition module, just "Contact Us" and we'll send you a link to add that module: $1400 or $120/mo

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
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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.