



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

September 15, 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 the program and already have tax and estate planning professionals I've been referring people to when clients need that, so how do I start with the seeds of a team already in place?
- ✓ You spoke recently about small business owners, I'd like to focus on serving that market. Could you talk about additional services I will need to best serve successful business owners?
- ✓ You mentioned last month that I can get it additional one-on-one coaching to implement this program. How do I sign up for that?

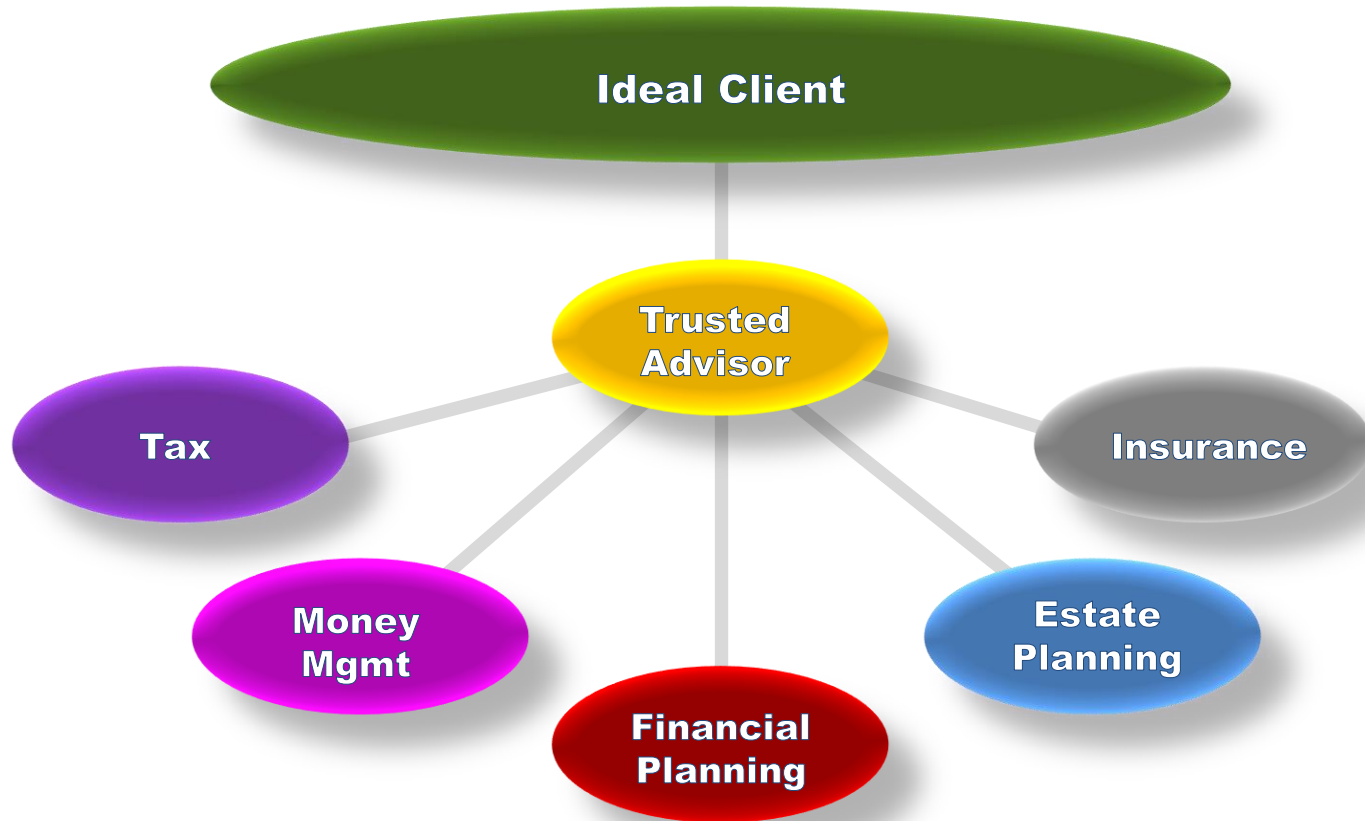


I'm new to the program and already have tax and estate planning professionals I've been referring people to when clients need that, so how do I start with the seeds of a team already in place?



The
Truly Comprehensive Financial
Services™
Business Model

Our Business Model is different



Fill only **ONE** vacancy at a time

We have designed an organized process for recruiting SMEs

If you've been working with SMEs at
some level, run them through the same
full 12-step process to ensure they're up
to the task, since you're changing to
a new **team approach**

This will allow you to
confirm that your
current Subject Matter Experts

- 1. Are willing to work in a new, more
collaborative, team environment.**
- 2. Confirm they are willing to accept
that The Team Goal is to consistently
exceed clients' expectations**



12-Step Process For Recruiting Subject Matter Experts



Identify
SME Role





Create a
best in class
profile



Develop
Candidate
List



Initial Research



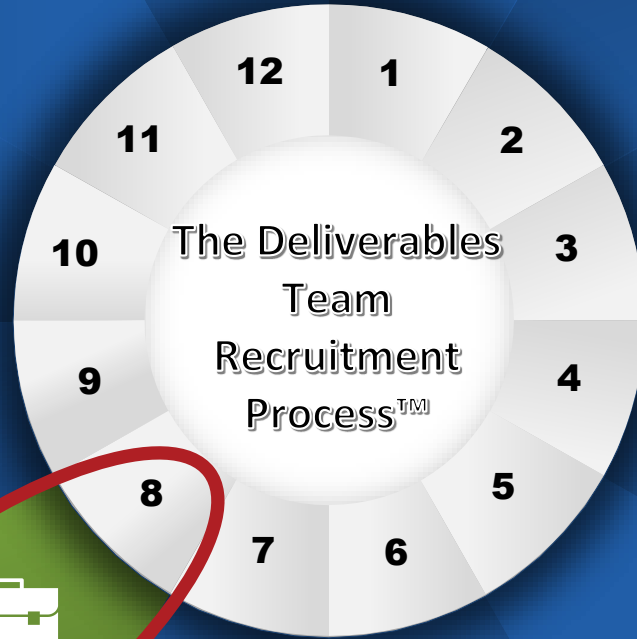
Research Call



Schedule
Meeting



The Initial
Discovery
Meeting™



The Best in Class
Assessment
Meeting™

Internal
Agreement
Meeting



The
Deal Structure
Meeting™



Finalize
Agreement



Present
Agreement







You spoke recently about small business owners, I'd like to focus on serving that market.

Could you talk about additional services I will need to best serve successful business owners?

These Need To Be 2 Separate Services

Personal Financial Goals



The Financial
Road Map®

Focus is on achieving all the
personal financial goals

Financial Independence Goal



The Success
Road Map®

Focus is on maximizing the value received from
the business for Financial Independence

Small to Medium-Sized Business Owners Represent a Major Opportunity Right Now

- ✓ 10,000 people are retiring every day (source WSJ)
- ✓ 19% of them own Small to Medium-Sized Business (source Forbes)
- ✓ 4½ million businesses will attempt to sell their businesses (exit) over the next 10-years (\$10trillion)

Small to Medium-Sized Business Owners Represent a Major Opportunity Right Now

- ✓ **MOST IMPORTANT STAT**
 - ✓ No more than 2 in 10 businesses will **actually sell**
 - ✓ Without help, most business owners will ***not receive*** anywhere near what they think they should for their businesses.
- ✓ **Businesses with 5-10 years until exit, have time to plan for this. They can build the value of their businesses, with planning.**

Find a business for sale

[Businesses for Sale](#)
[Franchise Opportunities](#)
[Business Brokers](#)

[Search](#)
[Advanced Search](#)

**The Internet's Largest
Business for Sale Marketplace**

The Most Buyers
100,000+ successful sales

The Most Sellers
45,000 active for-sale listings

The Most Traffic
10.7m monthly page views

Top Business Categories in California [See more categories](#)

There are almost always at least 2million businesses listed for sale

Sell Your Business Online

[Get Started Now](#)

BizBuySell has facilitated over **100,000 successful business** sales and is visited over **1 Million times each month** by potential business buyers.

[Learn more about the sales process](#)

Find a business for sale

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Go read their "Insight Reports" listing many statistics

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Only about 200,000 businesses actually sell each year

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80% - 90% Never sell

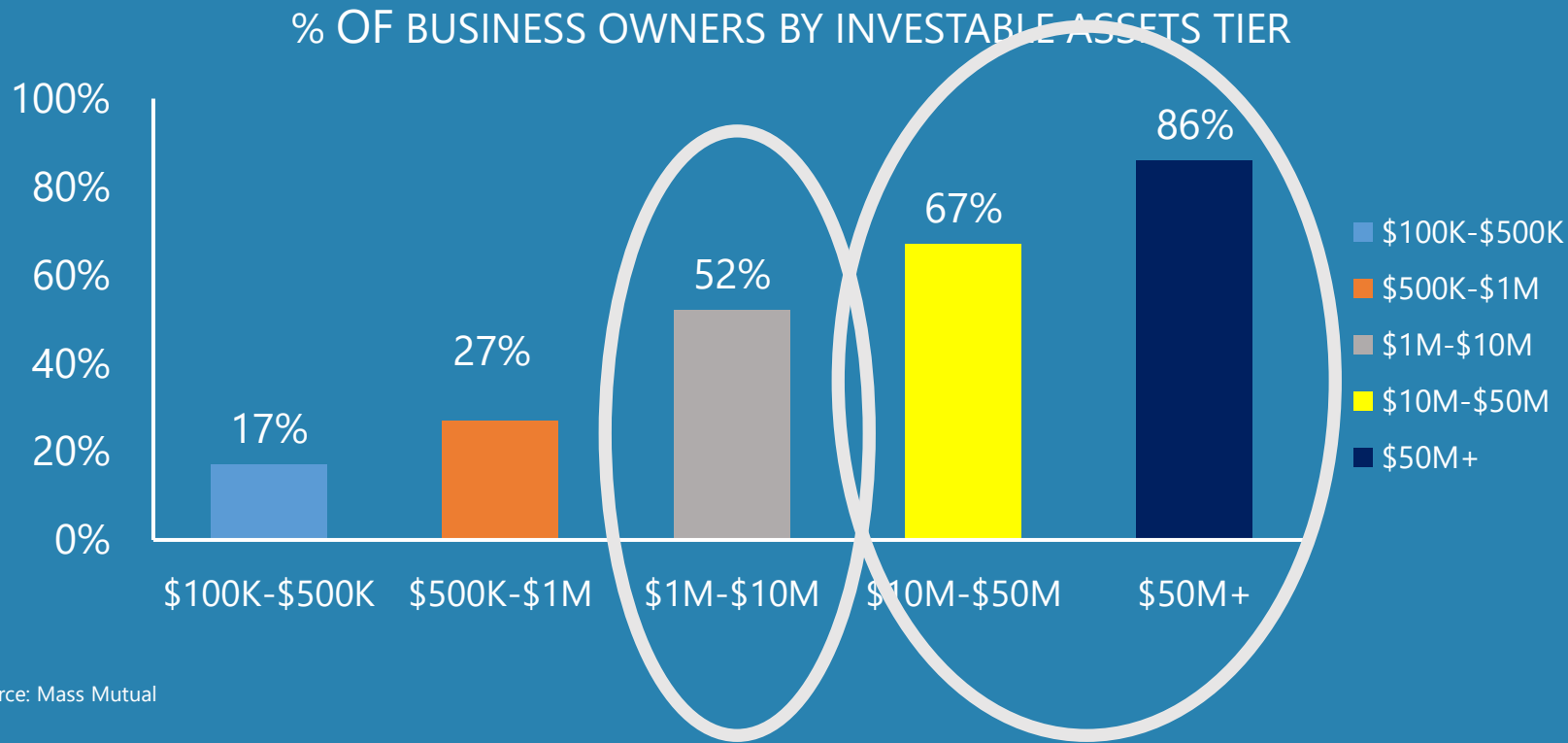
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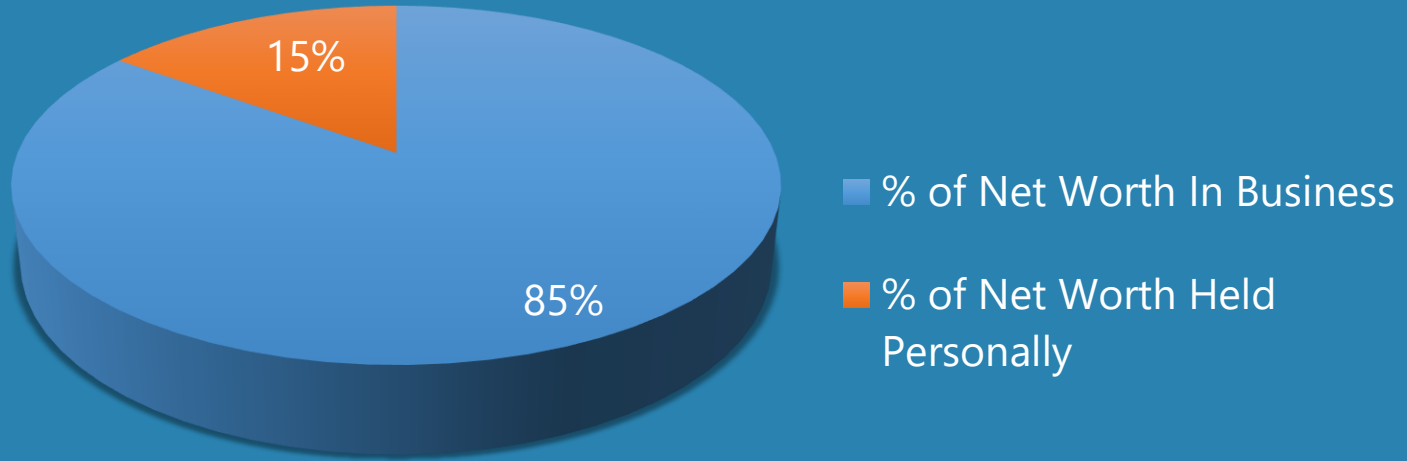
[Learn more about the sales process](#)

Business Owners Over-Represented in the HNW Segment; Virtually Own UHNW



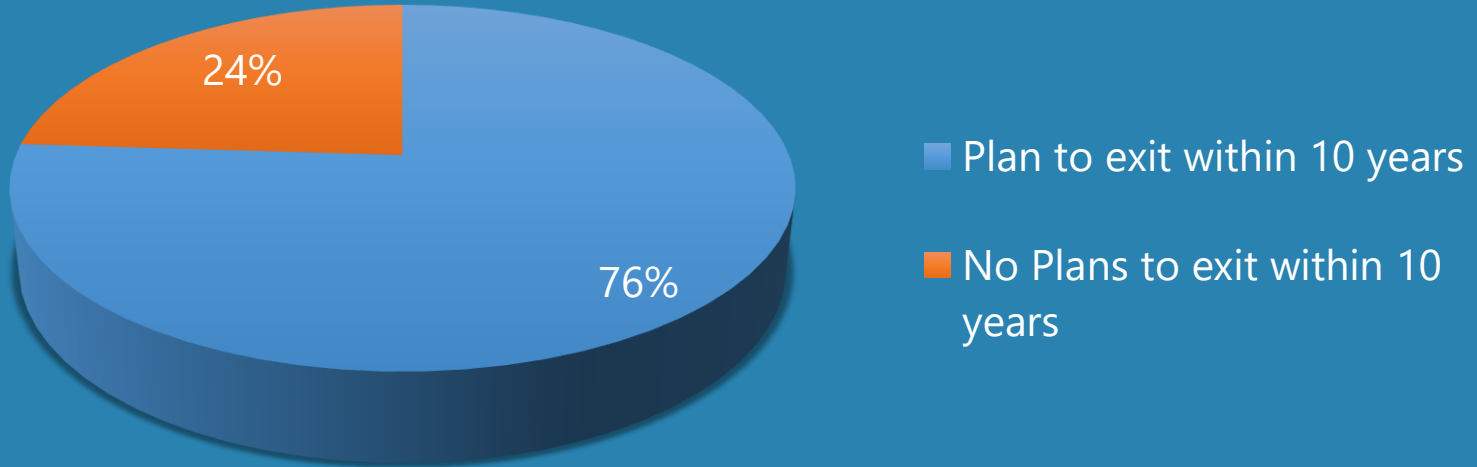
Up to 85% of Owner's Wealth Not in "Investable Assets"

AVERAGE BUSINESS OWNER

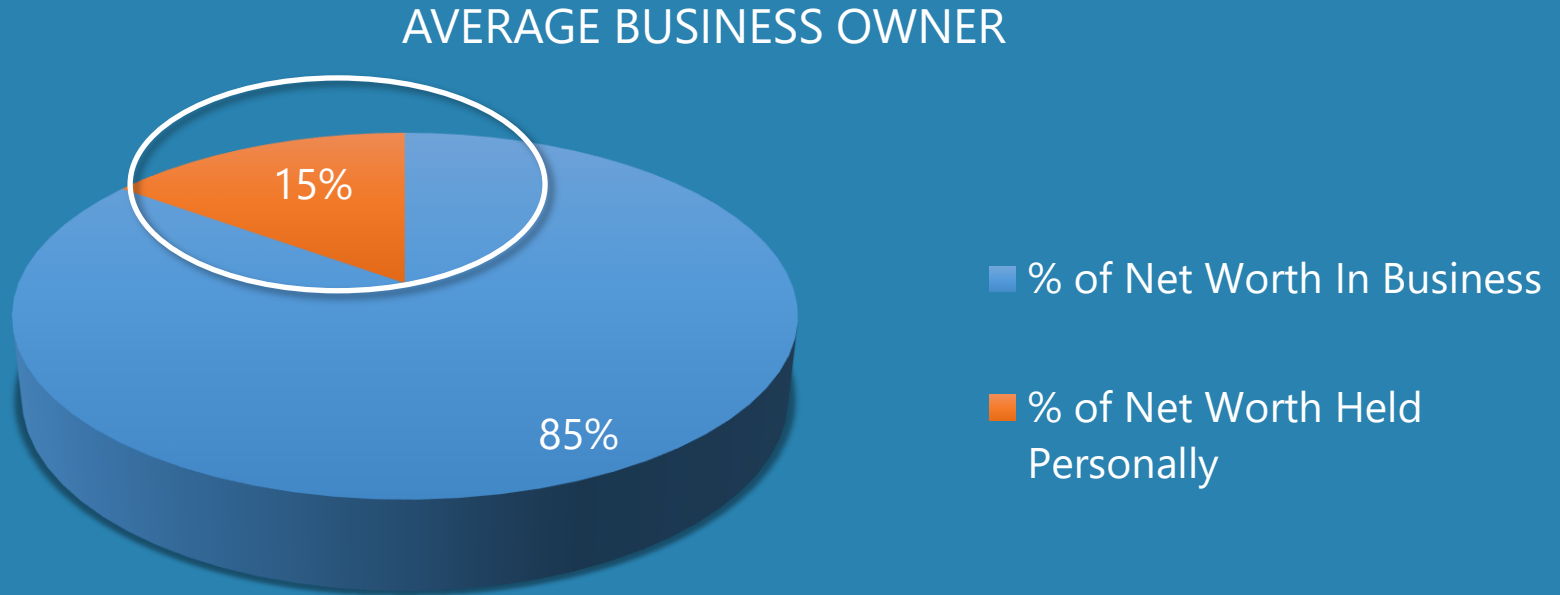


Three Quarters of Owners Planning to Exit Within the Decade

BUSINESS OWNER'S STRATEGIC PLANS

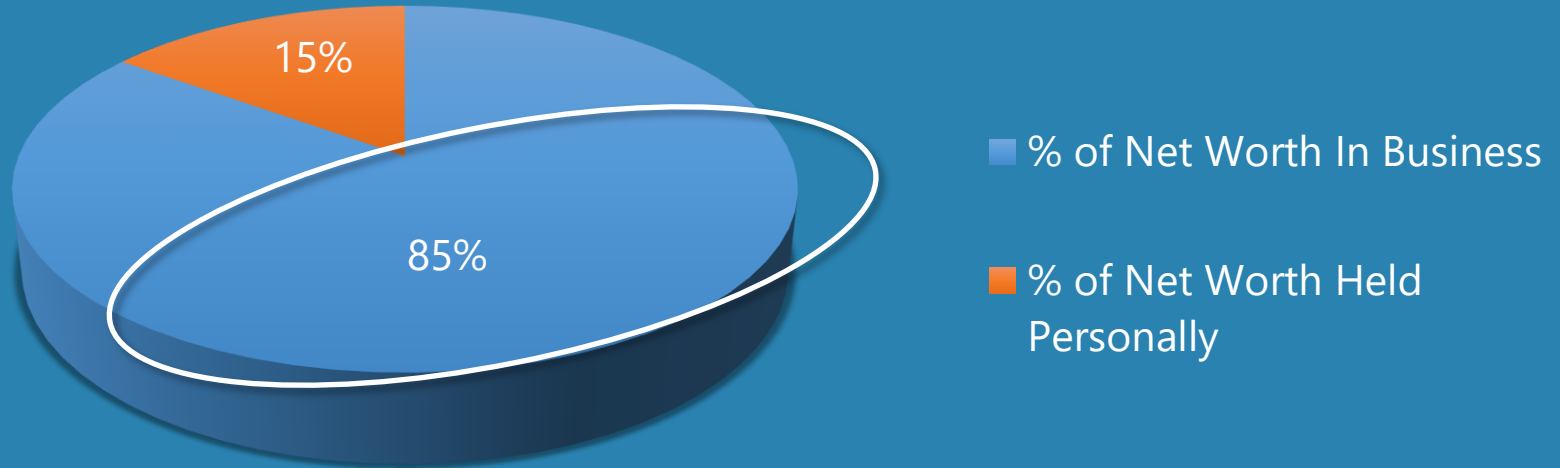


Most Advisors Make the Mistake of Talking about the 15%

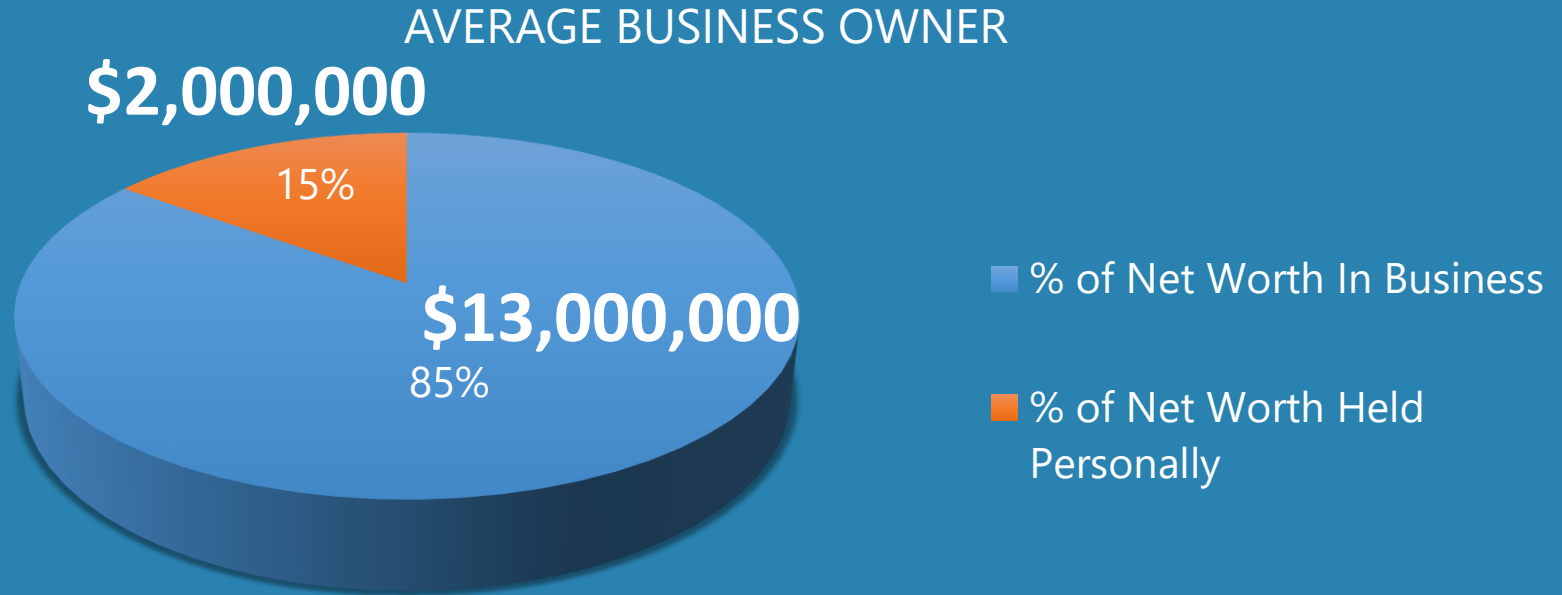


The Secret Is To Talk About The 85%

AVERAGE BUSINESS OWNER



The Secret Is To Talk About The 85%



These Need To Be 2 Separate Services

Personal Financial Goals

The Financial
Road Map®

\$2,000,000

Focus is on achieving all the
personal financial goals

Financial Independence Goal

The Success
Road Map®

\$13,000,000

Focus is on maximizing the value received from
the business for Financial Independence

Small to Medium-Sized Business Owners

Represent a Major Opportunity Right Now

- ✓ There are 28 million Small to Medium-Sized Business Owners in the United States
- ✓ 25% will have owners age 60+ (by 2022)
- ✓ 2.3 million will be listed for sale over the next 12 months (8.3%)
- ✓ Yet only 194k actually sold last year
(source bizbuysell.com)
- ✓ Only 1 in 12 businesses sell in the United States

Most Business Owners Are Unaware.

This is a crisis that can be fixed with planning.

It's a planning opportunity for you.

If you currently have a client who is a
Small to Medium-Sized Business Owner
who is planning to exit within **the next 5 years**
"Contact Us" and we'll schedule a call.
I'll give you a list of things you need to do



You mentioned last month that I can get it **additional one-on-one coaching** to implement this program.

How do I **sign up** for that?

Advisor PACT™ Monthly

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

Just tell us "*I want to switch to the coaching plan*"

Your monthly fee will switch to \$300/mo

You'll receive an invitation to

"*Mark's Office Hours*" at least once a week

"Mark's Office Hours"

- ✓ held at least once every week
- ✓ Bring any issue you need help with
- ✓ Group coaching, but it's one-on-one.
- ✓ First-come, first-served



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



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.