ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT Monthly Session™

February 16, 2021

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, for the next 60-minutes…

- ✓ Turn everything off. **No distractions** or Interruptions.
- ✓ Completely turn off your **emails**
- ✓ Close all **browsers**
- ✓ Turn off your **Phone** and all **Notification alerts**
- ✓ Multi-tasking **isn't** a thing (focus is the thing)

Have You Considered…

Something discussed today could easily be a breakthrough?
…a game-changer for your business?
You might miss it… if you're not focused.

Questions for today's session

- ✓ Is there a vision for The Advisor P.A.C.T. Monthly business model that sets it apart from the standard Financial Services Industry business model for Financial Advisors?
- ✓ Is there a simple Subject Matter Expert measure for success?
- ✓ I've been in the program 6-months and have only acquired one (1) SME. Is that good or bad (am I going fast or slow)?
- ✓ I'm having a hard time scheduling The Initial Discovery Meeting™ with SME Candidates. Could you cover that in detail?

Marque Little ▼

ADVISOR PACT™

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You are here: Home / Welcome to Advisor PACT™ Monthly

Welcome to Advisor PACT™ Monthly

Congratulations— ... ACT™ Monthly program.

News

[Register for The Online Meeting Plan™ SPECIAL SESSION](#)

Feb 16, 2021

First Steps

Before diving into your ... two hours on your calendar to watch the video below i...

Once you're ready, go ahead and dive into your first month's module by clicking on "The Monthly Project™" from the top menu bar. You'll have access to each module for 30 days. After 30 days, you'll receive a new module, so be sure and block enough time on your calendar to get through each module in time.

[Register for The Monthly Session™](#) and submit your questions at least 2 business days in advance.

If you have any questions, click Contact Us in the top right corner of any page.

If ever you wish to quit the program, provide us notice at rapidresponse@advisorPACT.com at least 2 business days prior to your next scheduled payment to avoid being charged again. We will not

Upcoming Events

Monthly Q & A Session (Feb 2021)
Feb 16, 2021 08:00 AM - 09:00 AM — Webinar

Monthly Q & A Session (Mar 2021)
Mar 16, 2021 08:00 AM - 09:00 AM — Webinar

Monthly Q & A Session (Apr 2021)
Apr 20, 2021 08:00 AM - 09:00 AM — Webinar

Upcoming events...

News

Register for The Online Meeting Plan™ SPECIAL SESSION
Feb 16, 2021

NOW LIVE: Replay of December's Group Coaching Webinar
Dec 15, 2020

Replay of November's Group Coaching Webinar
Nov 17, 2020

Replay of the August Group Coaching Webinar
Aug 18, 2020

Replay of July's Group Coaching Webinar
Aug 17, 2020

More news...

Register for The Online Meeting Plan™ SPECIAL SESSION

This is a LIVE session to REPEAT the content we covered back on Tue Jan 19th

Since there was a technical problem and no zoom recording was created for that session, I've agreed to go through the content again for any
session. The back-up session is scheduled to cover ***the exact same content*** we reviewed on Tue Jan 19th (Q&A Episode #78).

We will review how to create The Online Meeting Plan™ to organize your Subject Matter Experts for each Client Progress Meeting. The Onlin
software feature of our Flagship Program The Trusted Advisor Toolkit™, creating a unique web-page for your team regarding each Client Prog
create The Online Meeting Plan™ to coordinate your Deliverables Team Members and we'll cover how you can do that during this session.

Topic: Creating The Online Meeting Plan™

Register in advance for this webinar (Click Here)

Register for Q&A Episode 78 REDUX.

You are invited to a Zoom webinar.
When:

- Feb 16, 2021 08:00 AM Pacific Time
- Feb 16, 2021 09:00 AM Mountain Time
- Feb 16, 2021 10:00 AM Central Time
- Feb 16, 2021 11:00 AM Eastern Time

Topic: Creating The Online Meeting Plan™

Register in advance for this webinar (Click Here)

After registering, you will receive a confirmation email containing information about joining the webinar.

Upcoming Events

Monthly Q & A Session (Feb 2021)

Register for The Online Meeting Plan™ SPECIAL SESSION
Feb 16, 2021

NOW LIVE: Replay of December's Group Coaching Webinar
Dec 15, 2020

Replay of November's Group Coaching Webinar
Nov 17, 2020

Replay of the August Group Coaching Webinar
Aug 18, 2020

Replay of July's Group Coaching Webinar
Aug 17, 2020

More news...

Webinar Registration

Topic Creating The Online Meeting Plan™

Description We will review how to create The Online Meeting Plan™ to organize your Subject Matter Experts for each Client Progress Meeting. The Online Meeting Plan™ is the signature software feature of our Flagship Program The Trusted Advisor Toolkit™, creating a unique web-page for your team regarding each Client Progress Meeting. But you can manually create The Online Meeting Plan™ to coordinate your Deliverables Team Members and we'll cover how you can do that during this session.

This session is to cover the exact same content we reviewed on Tue Jan 19th (Q&A Episode #78). Since there was a technical problem and no zoom recording was created for that session, I've agreed to go through the content again for anyone who registers for this LIVE back-up special session.

As always, come prepared with ALL your questions related to client issues or questions about implementing any our systems. I'll devote ample time to Q&A.

Time Feb 23, 2021 08:00 AM in Pacific Time (US and Canada)

* Required information

First Name *

Last Name *

Email Address *

Confirm Email Address *

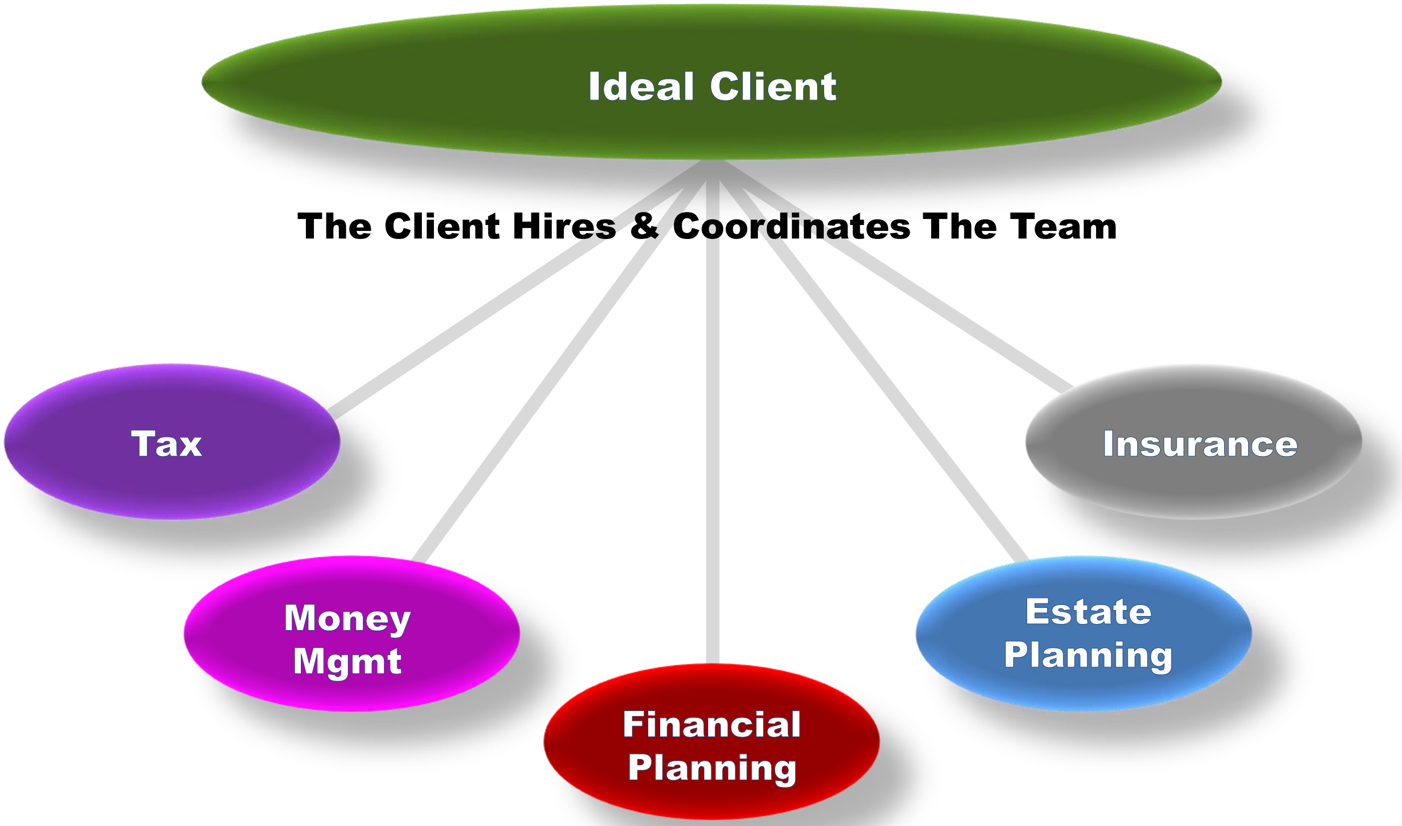
By registering, I agree to the Privacy Statement and Terms of Service.

Register

Question

Is there a vision for The Advisor P.A.C.T. Monthly business model that sets it apart from the standard Financial Services Industry business model for Financial Advisors?

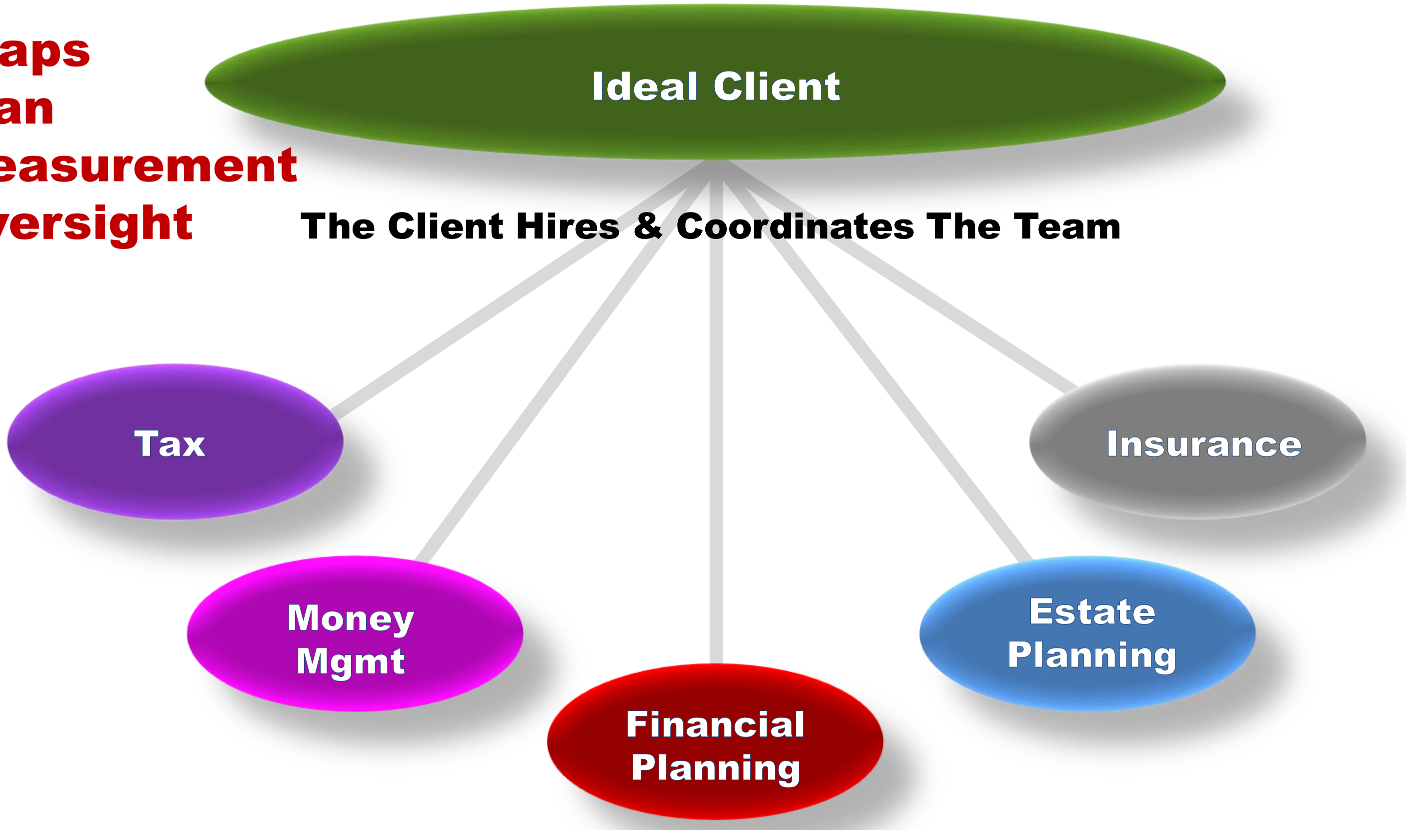
The Traditional Financial Services Business Model



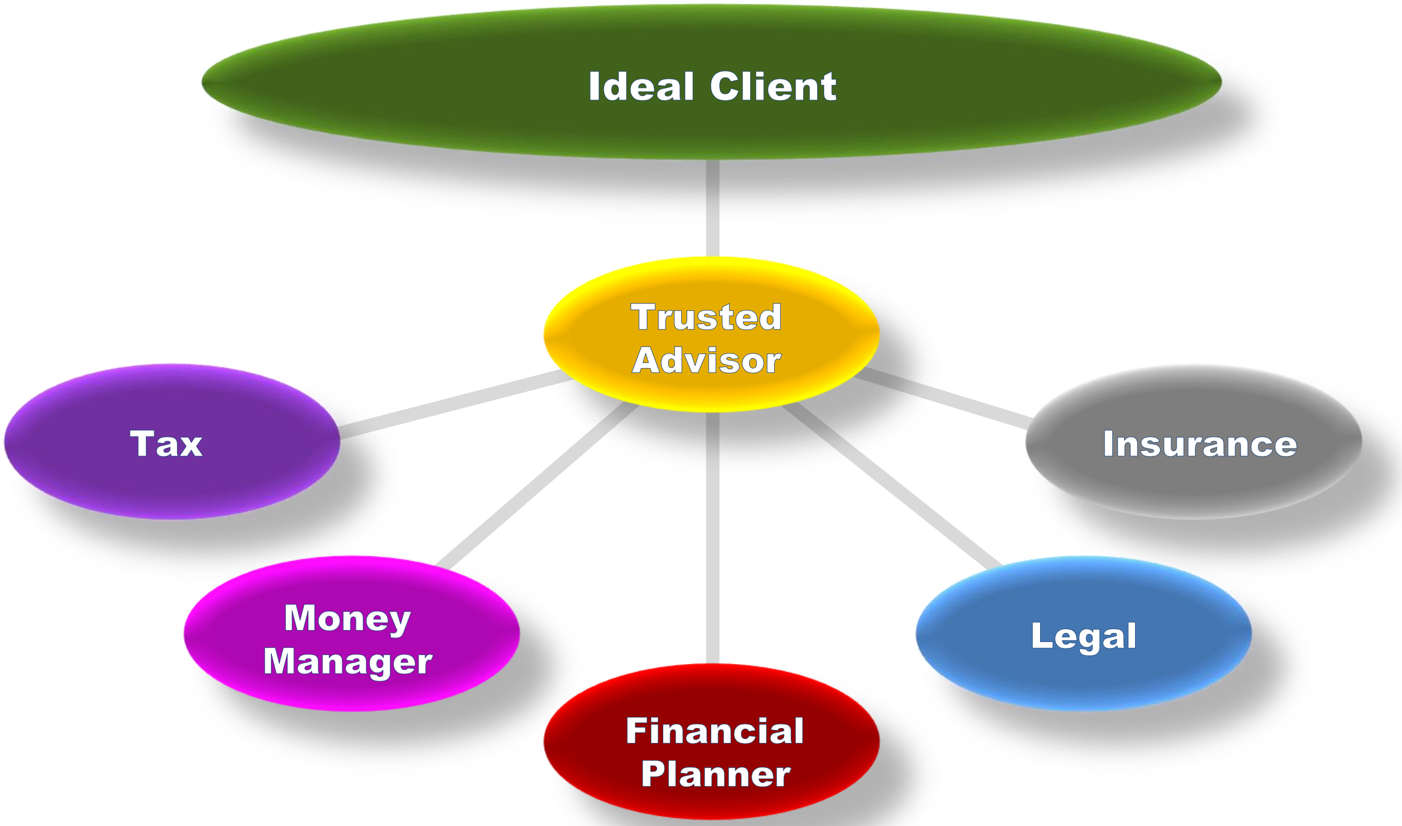
The Traditional Financial Services Business Model

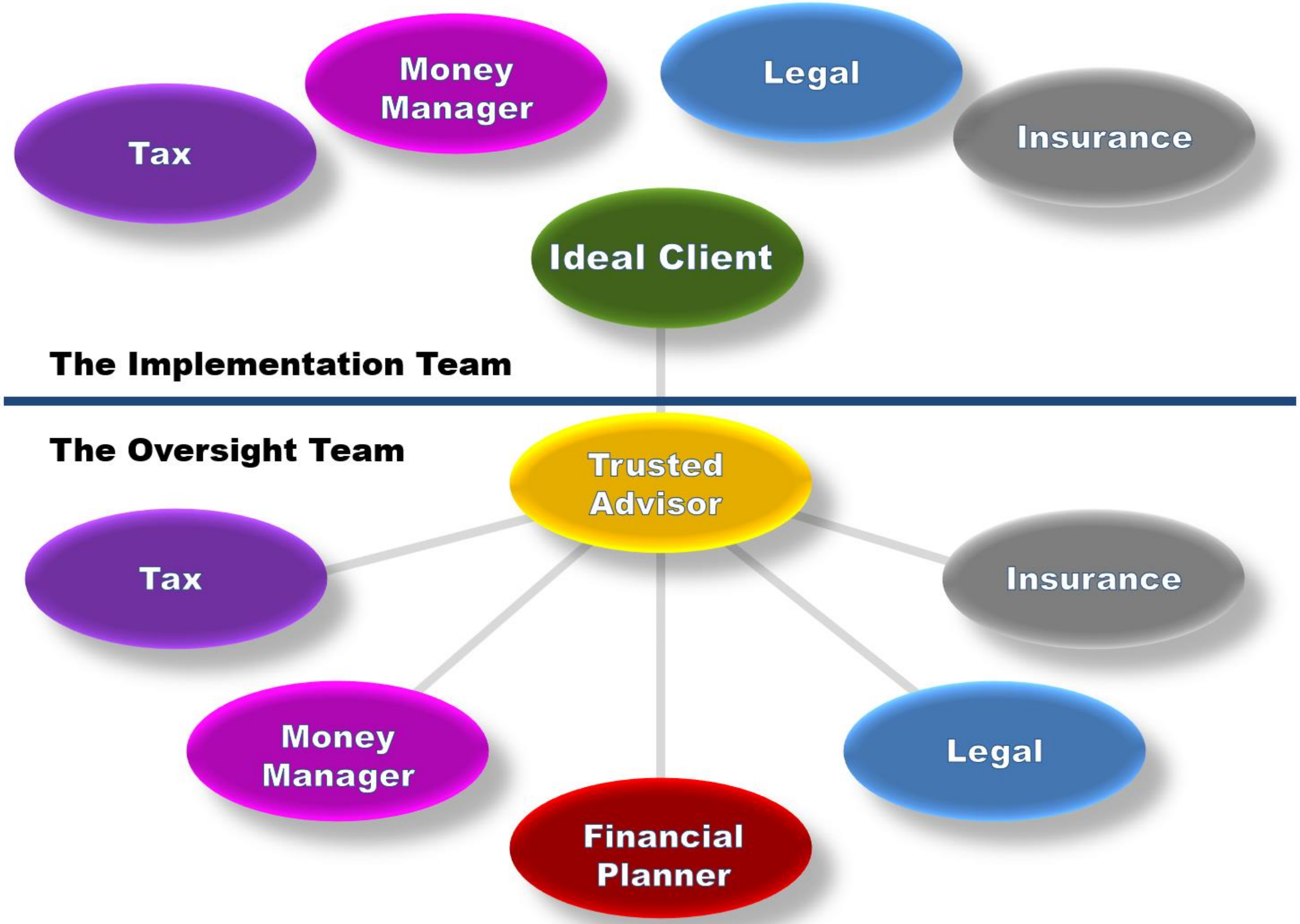
Usual Gaps

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



Our Unique Deliverables Team Structure




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

APM Business Vision

SKILLED TEAM OF FIVE (5) SMEs

Acquire a team of 5 Subject Matter Experts to fully deliver Truly Comprehensive Financial Services™.

Once an Ideal Client is acquired, The 5 SMEs perform all new client on-boarding, plan creation, & provide ALL on-going services.

Each SME already has a robust team and process in place

Truly Comprehensive Financial Services™

5 Areas of personal finance are served...

FINANCIAL PLANNING
Financial Planning Subject Matter Expert

TAX
Tax Planning Subject Matter Expert

MONEY MANAGEMENT
Money Management Subject Matter Expert

ESTATE PLANNING
Estate Planning Subject Matter Expert

SAFETY (Risk mitigation/Insurance)
Insurance Subject Matter Expert

CLIENT FOCUSED SOLUTION

MAKE IMPLEMENTATION EASIER

We take-over our client's financial to-do list

SAVE CLIENT TIME

We do as much as possible on behalf of our client
(so our Ideal Client doesn't have to)

The Three Meeting Process™

We meet at least once every 4 months

The Comprehensive Safety Review™

Increase the safety of the overarching strategy

The Goal Progress Outlook™

Review & update goals (incl. Estate Plan)

The Annual Review™

Measure Success | Review Cash Reserves | Debt

The Team Goal

Every Team Member...

Agrees to The Team Goal

Agrees to exceed client expectations
before joining the team

Provides evidence of The Team Goal

Lots of impressive action items & recommendations submitted prior to ***every*** Client Progress Meeting

Is held accountable to The Team Goal

If cannot contribute to The Team Goal ...agrees to leave (why be on a team if can't contribute?)

APM Business Vision

SKILLED TEAM OF FIVE (5) SMEs

Acquire a team of 5 Subject Matter Experts to fully deliver Truly Comprehensive Financial Services™.

Once an Ideal Client is acquired, The 5 SMEs perform all new client on-boarding, plan creation, & provide ALL on-going services.

Each SME already has a robust team and process in place

Question

Is there a simple Subject Matter Expert measure for success?

The number of action items & recommendations produced for each Client Progress Meeting

MUST BE IMPRESSIVE

Off the shelf

Standard

Canned recommendations

DON'T COUNT

3-5 Impressive action items required of each SME per Client Progress Meeting

(20+ recommendations per meeting)

Question

I've been in the program 6-months and have only acquired one (1) SME.
Is that good or bad?
(am I going fast or slow?)

APPRECIATE PROGRESS!!

You have a skilled SME in place who is consistently exceeding your Ideal Clients' expectations

Celebrate that

FOR THE FUTURE...
The Deliverables Team Recruitment Process™ we teach is designed to fill an SME vacancy in less than 60 days

FOR THE FUTURE...

Your goal is to fill at least three (3) SME vacancies every 6-months

TO BE ON TRACK...

Fill all five (5) SME vacancies in less than 10-months

HOLD YOURSELF ACCOUNTABLE...

If you're filling vacancies at a slower pace, then ask more questions here

HOLD YOURSELF ACCOUNTABLE...

It's HIGHLY LIKELY the division of labor between you and your Administrative Manager needs improvement

You need to ask more questions about that during these sessions (come prepared)

Question

I'm having a hard time scheduling The Initial Discovery Meeting™ with SME Candidates. Could you cover that in detail?

Mark Mckenna Little ▼

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You are here: Home / The Monthly Project™ / The Deliverables Team Recruitment Process

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Introduction

Acquire your next Deliverables Team member in 12 sim

Step 6: Schedule the Initial Discovery Meeting™

Watch: The Deliverables Team Recruitment Process™ Introduction (5 minutes)

Objective	Understand the big picture overview of the team member acquisition process that will be outlined in this course.
Instructions	1. Watch the video above. 2. Proceed to the next section.

« Previous: index.png

Next: Step 1: Identify Position to Fill »

Trusted Advisor task
(not Administrative Manager task)

Simple 4-point message

1 of 4

We have affluent clients with complicated situations at times.

They need a Financial Planner, but not just any Financial Planner.

They could afford to hire anyone (the best).

2 of 4

As such, I've made it my goal to sit down & meet most skilled Financial Planners in our field.
I'm looking for someone to send all of our Ideal Clients.
Are you accepting new clients?

3 of 4

Do you provide Truly Comprehensive Financial Services™ to Ideal Clients?

How do you define an Ideal Client?

Roughly how many Ideal Clients do you serve?

4 of 4

I'd like to sit down with you to better understand what you do & who you do it for.

Could we schedule an hour sometime next week?

Advisor PACT™ Monthly

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

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

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.