



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

March 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

- ✓ I'm having a problem filling a couple of SMEs in the area where I live, particularly the Accountant. Any advice?
- ✓ I know you have an entire module regarding hiring an Administrative Manager, but I'm considering having someone ELSE conduct the interviews for me. Any advice for that? Would the interview change at all?
- ✓ I've found a couple of SMEs I like for one of my team vacancies. I like them both. Any advice for a tie-breaker to fill the vacancy?

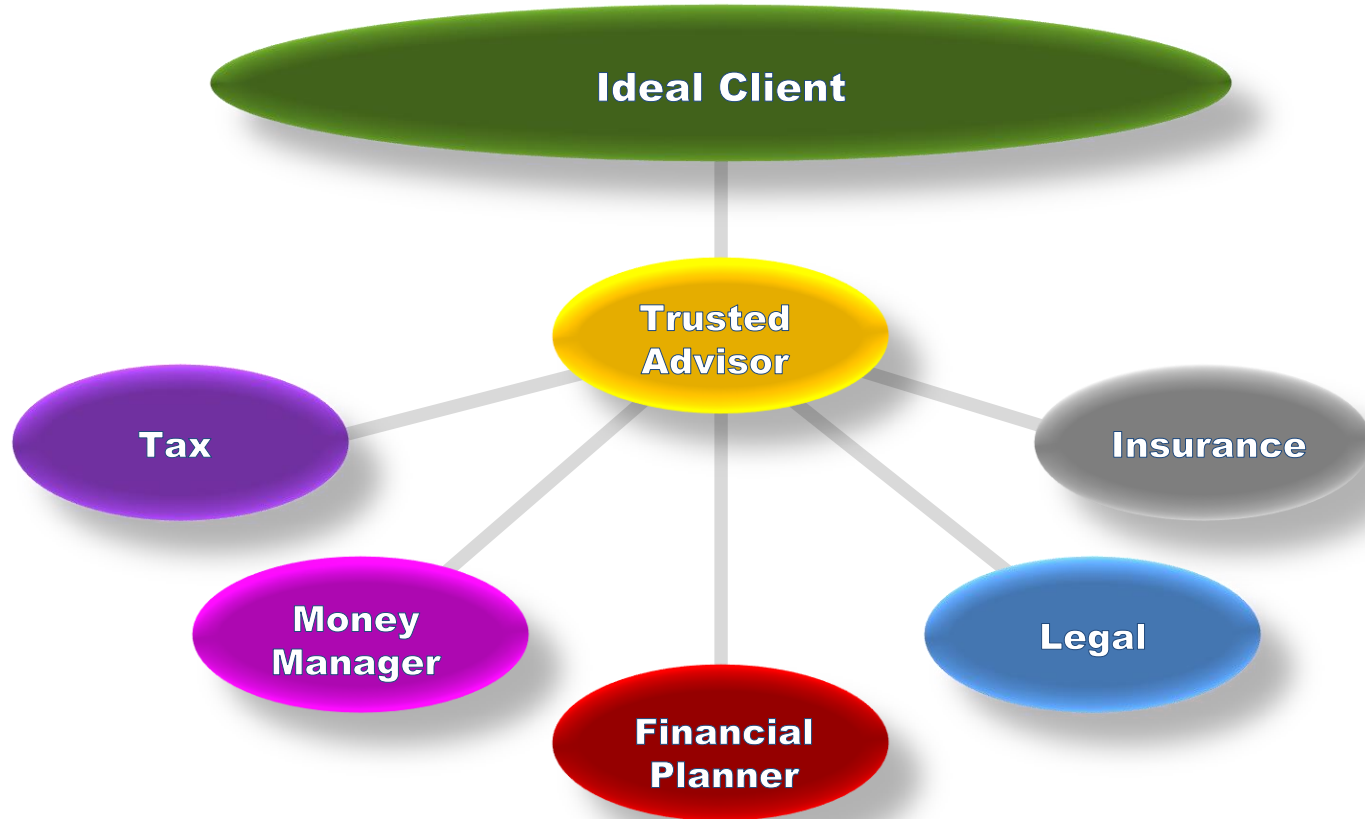


Question

I'm having a problem filling a couple of SMEs in the area where I live, particularly the Accountant.

Any advice?

Our Unique Deliverables Team Structure



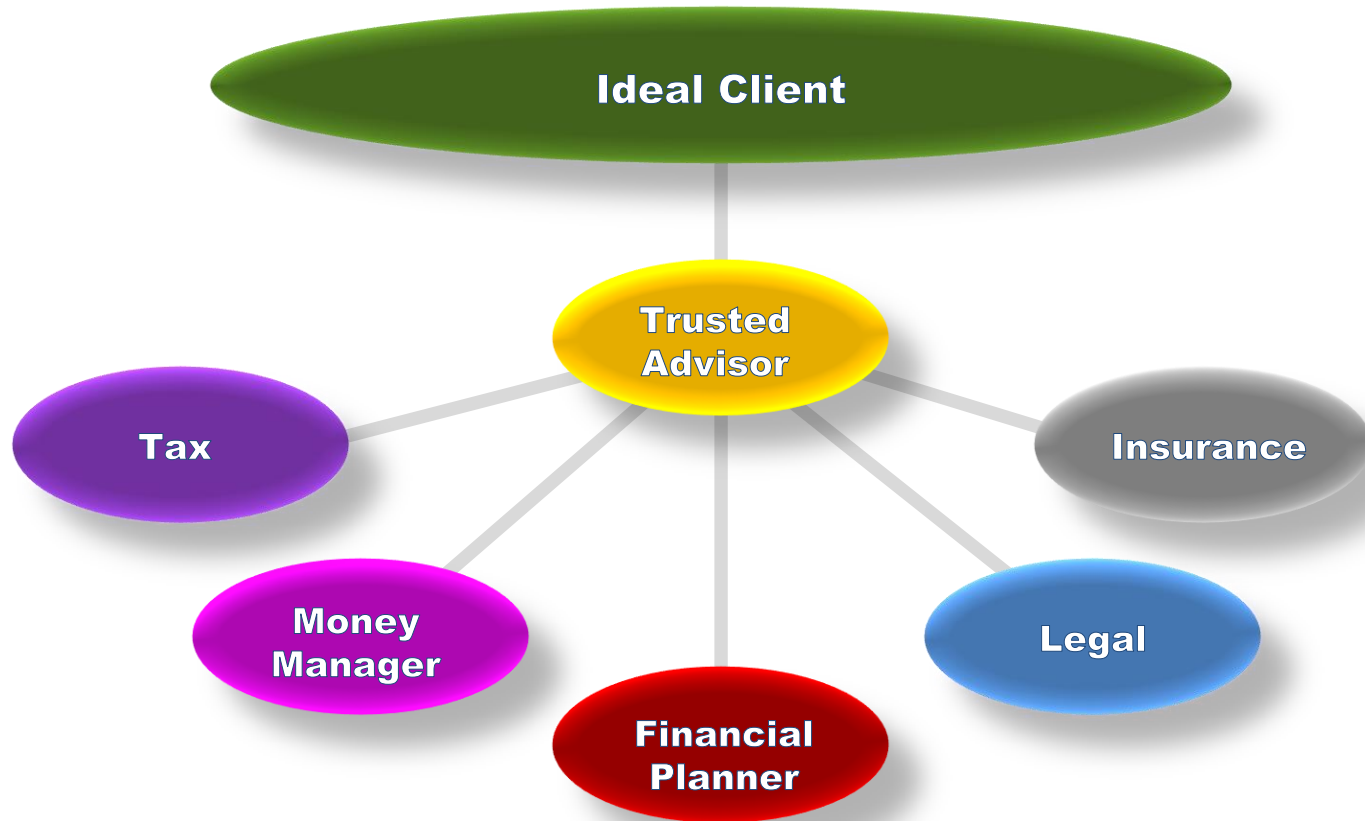
Can't find SMEs in my area...

Filling all 5 SME Vacancies
is the **number one**
objective in
this business model

Can't find SMEs in my area...

The **Quantity & Quality** of Action Items & Recommendations at each Client Progress Meeting

Our Unique Deliverables Team Structure



Can't find SMEs in my area...

But what if you **can't find**
5 skilled SMEs in your
geographic area?

Can't find SMEs in my area...

Then Go **Virtual**

Can't find SMEs in my area...

Greater **number** of Candidates
&
Higher **Quality** of Candidates

Can't find SMEs in my area...

All 5 of **my SMEs** are virtual

Can't find SMEs in my area...

Better to have
5 virtual SMEs
than 2-3 local SMEs

Can't find SMEs in my area...

...and Virtual SMEs are
generally **more productive**



Question

I know you have an entire module regarding hiring an Administrative Manager, but I'm considering having someone ELSE conduct the interviews for me.

Any advice for that?

Would the interview change at all?

Be sure to have all
interviews recorded

Interviewing For Administrative Manager Role...

Listen to the 2 best candidates' interviews

Before making any final
decision, contact a
minimum of 6 references

"Would you say _____ is more of a
take-charge & lead the project
type person?

...or more of a tell _____ ***what to do***
& they'll get it done type person?"

"Tell me about a time
when _____ took charge of
a project & that leadership
made a big difference"

"Which projects do you recall where _____'s involvement was the driving force?"

"Tell me about times when
_____ 's follow up &
follow through saved the
day?"

"Standards are quite high here.
Can you recall a project that, as
coordinator, _____ rejected
the work of various team
members a "below standard?"

Interviewing For Administrative Manager Role...

Feel free to hire 1 or 2 on a
trial basis

Interviewing For Administrative Manager Role...

THE BEST TRIAL PROJECT:

Find me 100 SME

Candidates for one vacancy



Question

I've found a couple of SMEs I like for one of my team vacancies.

I like them both.

Any advice for a tie-breaker to fill the vacancy?

SME Tie-breaker...

If it's down to 2 SME
Candidates
...and it's close

SME Tie-breaker...

Ask **both of them** to create
a comprehensive written
lifetime financial strategy

SME Tie-breaker...

Don't give much direction
as to what you expect,
other than
...impress me

SME Tie-breaker...

Explain that the final
product **MUST** fit **all** these
5 words

"comprehensive written lifetime financial strategy"

SME Tie-breaker...

Comprehensive

SME Tie-breaker...

Written

SME Tie-breaker...

Lifetime

SME Tie-breaker...

[Financial]
[or tax]
[or Estate Planning]
etc...

SME Tie-breaker...

Strategy

SME Tie-breaker...

Comprehensive Written Lifetime [Financial] Strategy

SME Tie-breaker...

Give a reasonable amount
of time

Then assess the **quality** of
the work you get back

SME Tie-breaker...

Is this work well **above** average?

Will it impress Ideal **Clients**?

Does it impress **me**?

SME Tie-breaker...

Invite the **most** impressive SME onto
your team

Imagine when you have 5 skilled SMEs
generating 15-20 client
recommendations per meeting

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Episode 47: The 5 Elements Of a Well-Structured "Financial Plan"

2018-06-18 Monthly Q & A Replay

Also on this page...

Click on any of the links below to jump to that section of the page

- Downloadable audio and presentation PDF from this episode
- List of concepts from this episode

The Monthly Session Replay

When	Jun 19, 2018 from 08:00 AM to 09:00 AM
Where	Webinar
Contact Name	Mark McKenna Little
Add event to calendar	vCal iCal



Duration: 68 minutes

[Download audio-only MP3 version](#)

[Download Mark's Presentation PDF](#)

Upcoming Events

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

Monthly Q & A Session (May 2021)
May 18, 2021 08:00 AM - 09:00 AM — Webinar

Monthly Q & A Session (Jun 2021)
Jun 15, 2021 08:00 AM - 09:00 AM — Webinar

[Upcoming events...](#)

News

Holiday Closure - April 2, 2021
Mar 12, 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

[More news...](#)

Template For a Well-Structured “*Financial Plan*”

There are 5 elements of a
comprehensive written lifetime financial strategy
following The Advisor PACT™ method.

Here's The Checklist:

1. A comprehensive written lifetime financial strategy from all 5 Subject Matter Experts
2. A lifetime capital projection
3. A Cash Reserves Plan (Cash Reserves strategy & target amount)
4. A Debt Plan (schedule)
5. An "Assumptions Page" for each of the 5 areas of personal finance

You are here: [Home](#) / [Advisor PACT™ Monthly](#)

Advisor PACT™ Monthly

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



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.