

ADVISOR | PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

# **The Monthly Session**

## Monthly Advice Session

September 20, 2022

With Host Mark McKenna Little

Get the advice you're paying for in The Advisor P.A.C.T. Monthly Program™.

“Contact Us” with *every* issue you're struggling with



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

Explain your biggest  
problem or obstacle  
and I'll give you my  
advice based on  
what I've done in  
your situation

Mark McKenna Little

Mark McKenna Little | Founder/Creator | The Mark of Mastery™ For Financial Advisors

[www.TheMarkOfMastery.com](http://www.TheMarkOfMastery.com)

<https://themarkofmastery.com/>

# Questions

- ✓ **QUESTION 1:** I had a potential client this week obsessing on all the dispiriting economic news being reported.
  - ✓ They feel the economy, investments & world events are the worst in their lifetimes. ...and that things are different, and worse, than ever before.
  - ✓ Does “faith in the future” remain as a fundamental principle to successful long-term investing?
- ✓ **QUESTION 2:** Mark, I have a client who’s paid me \$6k for the past year for Comprehensive Financial Services and is now coming up on their 1-year anniversary working with me.
  - ✓ They’ve been time-consuming to serve, but have lots of assets
  - ✓ How do I make the case that someone who has ample assets like that should join my Ideal Client Community?

**As Financial Advisors is**  
***Faith in the future***  
**still a fundamental**  
**principle of successful**  
**investors?**

**Has our economic outlook declined so much, the worst in more than 40 years , including inflation, that *things are different this time?***

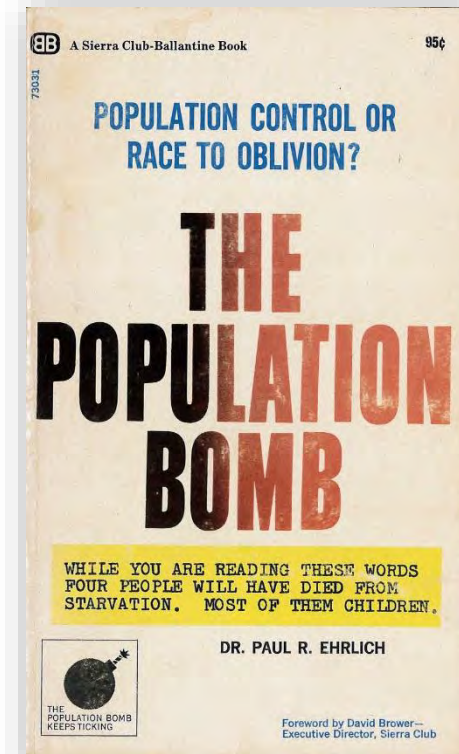
# The Global Reality

- ✓ Massive **improved** standards of living & prosperity over the last 200 years (& **accelerating**).
- ✓ Absolute Poverty is **vanishing** (2030: 0% worldwide are projected to be below the current poverty rate)
- ✓ There are **more** forests today, reducing CO2, than 100 years ago (Reforestation: more forests in China & India than 30 years ago)
- ✓ Child mortality rate in Africa has **improved** to the point it's the same as it was in Europe in 1952 (and is improving)
- ✓ Resources are **increasing**, due to productivity & technological advancements (food is

# THE REALITY FOR US

- ✓ **Abundance is accelerating**
- ✓ **Prosperity has increased at historic levels (and is increasing)**
- ✓ **Economic freedom continues to improve worldwide (The Fraser Institute's worldwide metrics).**
- ✓ **The basis for faith in the future historically solid (reality-based)**

# 1969 Culture of Panic



September 20, 2022

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ADVISOR | PACT™



# 1974 Culture of Panic



The movie  
takes place in  
2022

# 2022 Reality

*There's ample food to feed the entire world (and the rate of abundance is increasing).*

*The current problems relate to distribution, but the food supply is greater than needed, and growing at an increasing rate.*

**Not saying there are no  
problems.**

**Simply saying there's  
no evidence today's  
problems are beyond our  
ability to resolve them.**

**Just confirming that**  
***Faith in the future***  
**remains the only realistic**  
**outlook. Thinking**  
**otherwise is a *fringe***  
**theory**



**Truly Comprehensive Financial  
Services™**



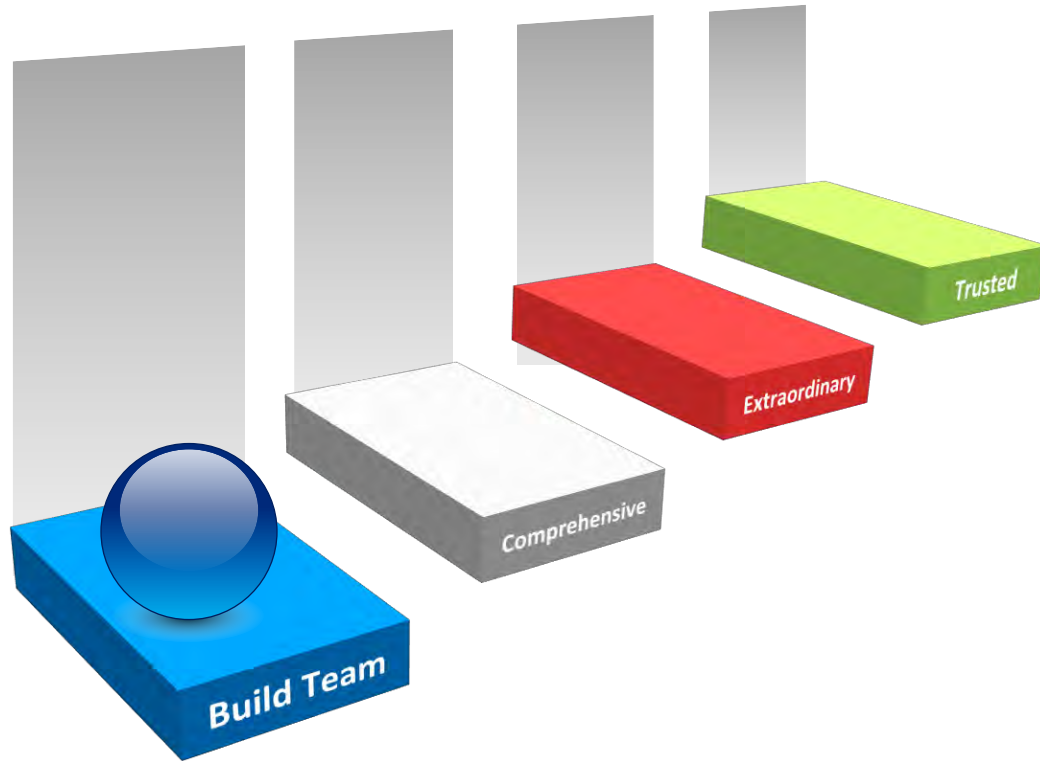
**Truly Comprehensive Financial  
Services™  
(**unsolicited** client referrals)**

# The **Advisor PACT™** Monthly Program

Summary

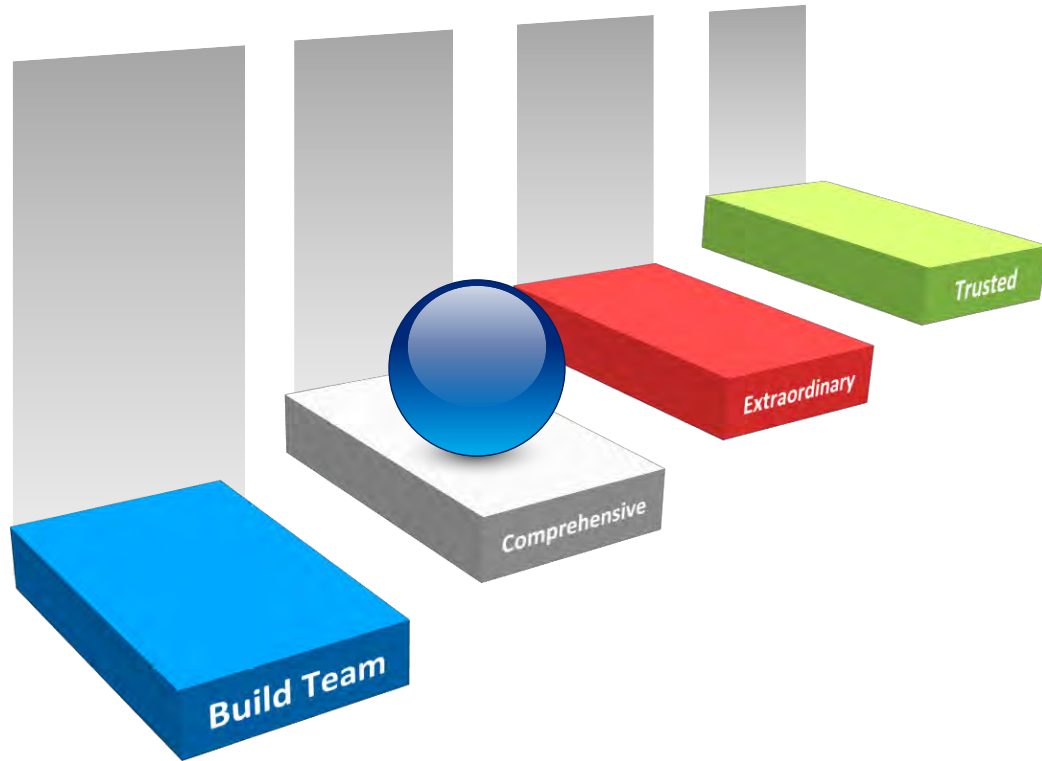
- ✓ **Resolve: Deliver Truly Comprehensive Financial Services™ at the highest level**
- ✓ **Execute: Fill Administrative Manager + 5 Subject Matter Expert vacancies within 30 days**
- ✓ **Leadership: Hold everyone accountable to your standards.**

# Delivering on The Promise – **WHAT TO DO**

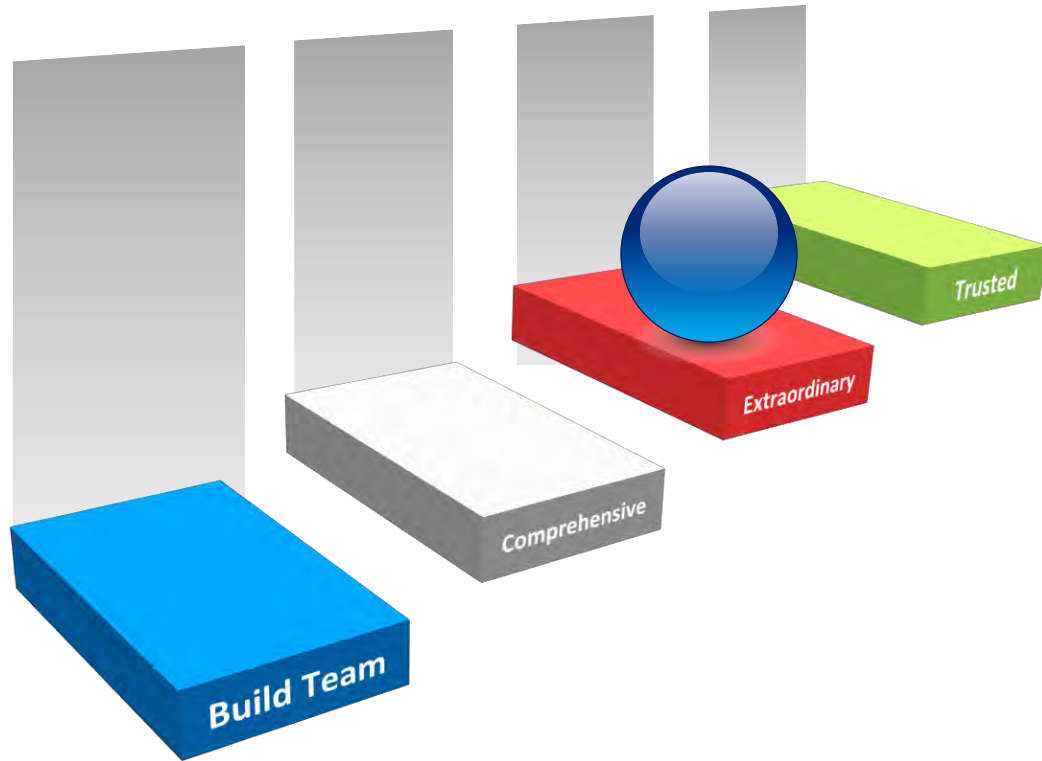




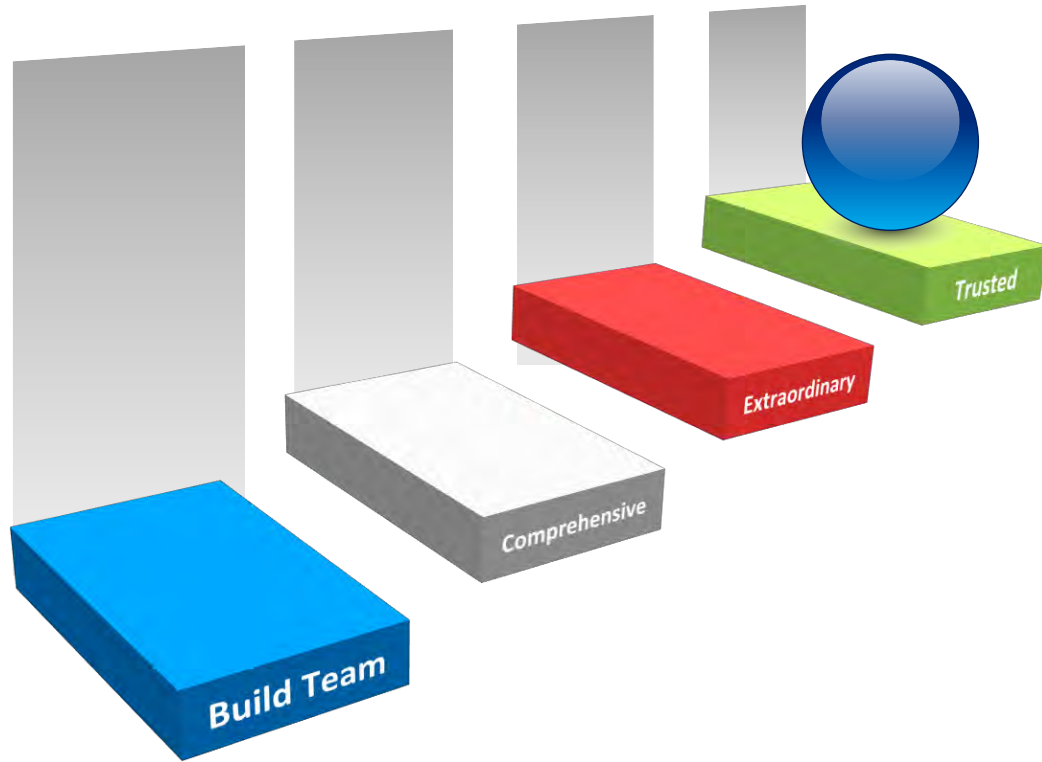
# Delivering on The Promise



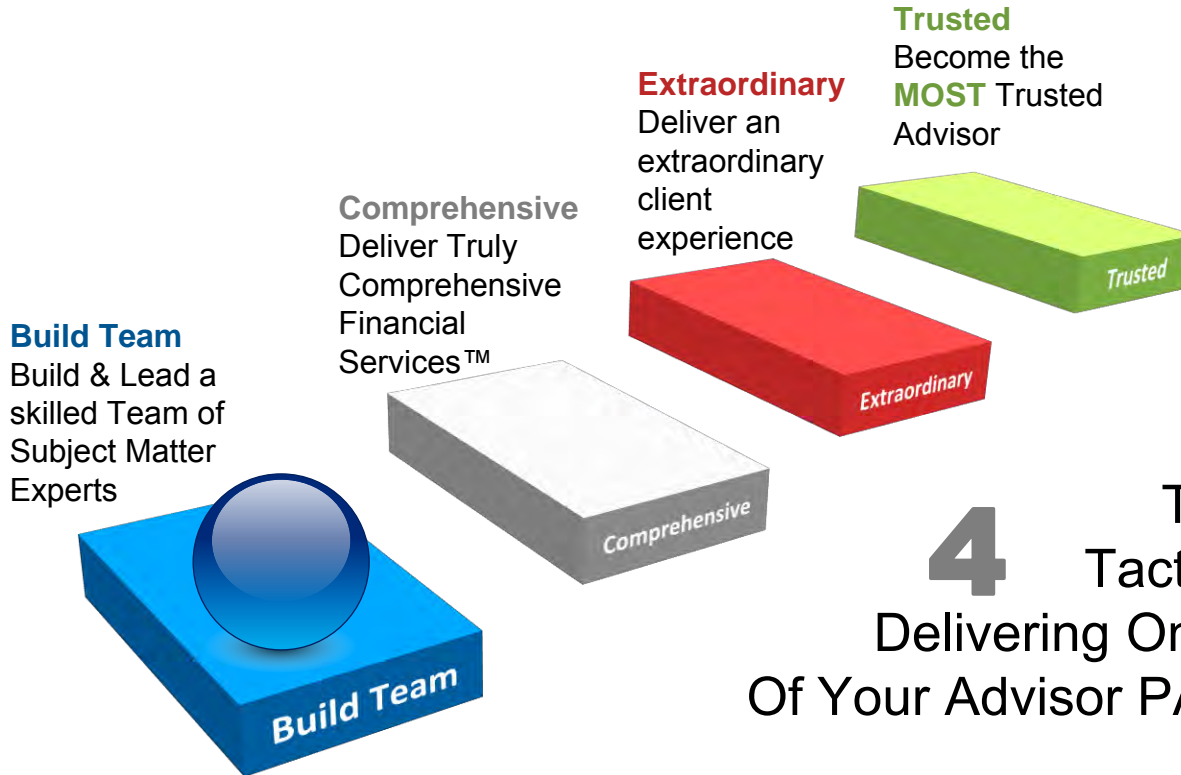
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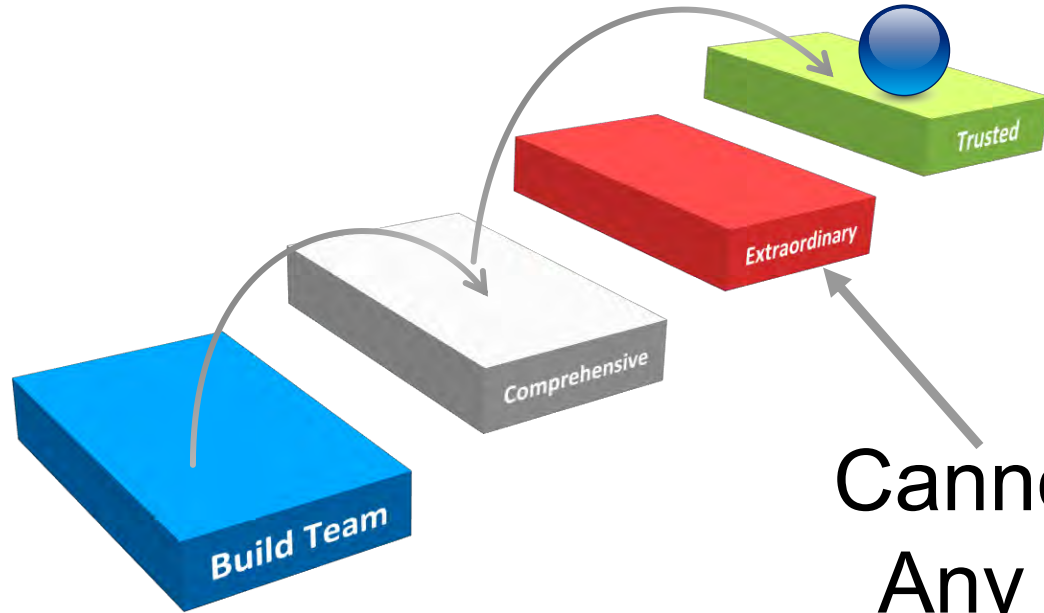


# Delivering on The Promise



**4** These Are The Tactical Steps For Delivering On The Promise Of Your Advisor PACT™ Pledge

# Delivering on The Promise



Cannot **Skip**  
Any Steps

# What do these terms mean?

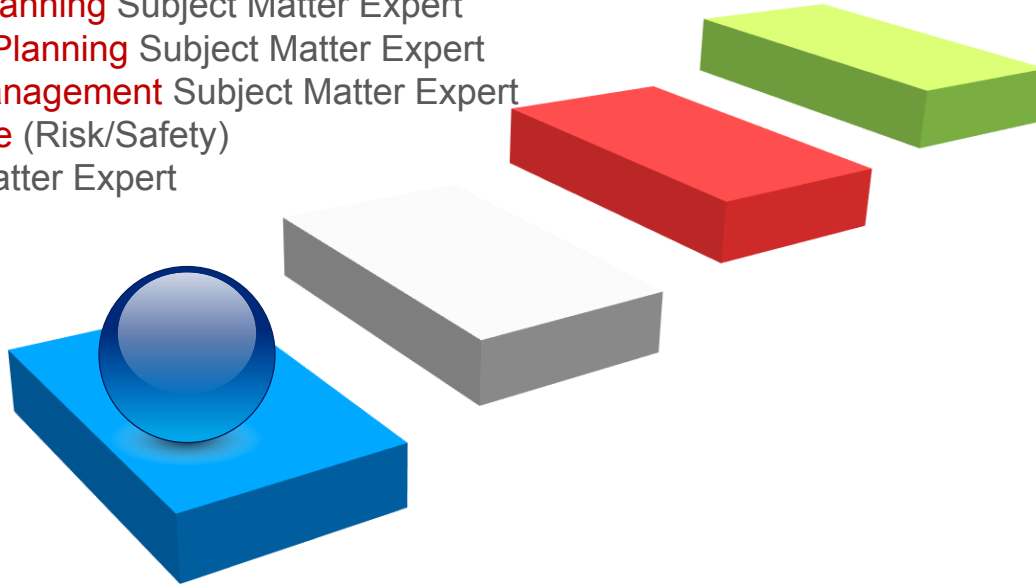
- ✓ **Build Team**
- ✓ **Comprehensive**
- ✓ **Extraordinary**
- ✓ **Trusted**

# Delivering on The Promise – **Build Team**

## Build & Lead Your Team

We're going to build a team of highly skilled Subject Matter Experts.

- ✓ A **Tax Planning** Subject Matter Expert
- ✓ An **Estate Planning** Subject Matter Expert
- ✓ A **Financial Planning** Subject Matter Expert
- ✓ A **Money Management** Subject Matter Expert
- ✓ An **Insurance** (Risk/Safety) Subject Matter Expert



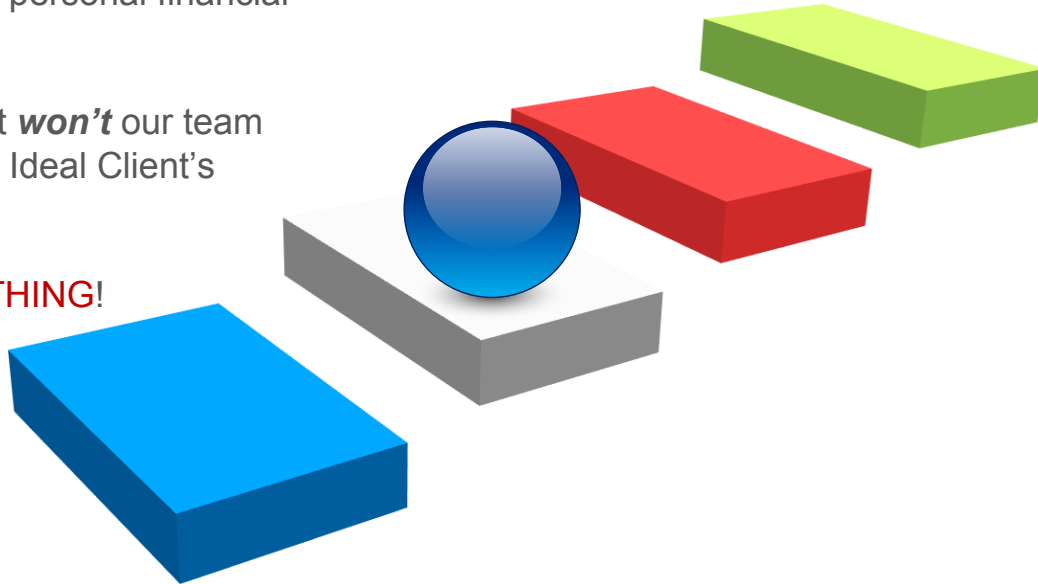
# Delivering on The Promise - **Comprehensive**

## Implement Truly Comprehensive Financial Services™

Our skilled team of Subject Matter Experts will coordinate **all aspects** of an Ideal Client's personal financial affairs.

“Potentially what **won't** our team coordinate in an Ideal Client's financial life?”

Answer: ... **NOTHING!**



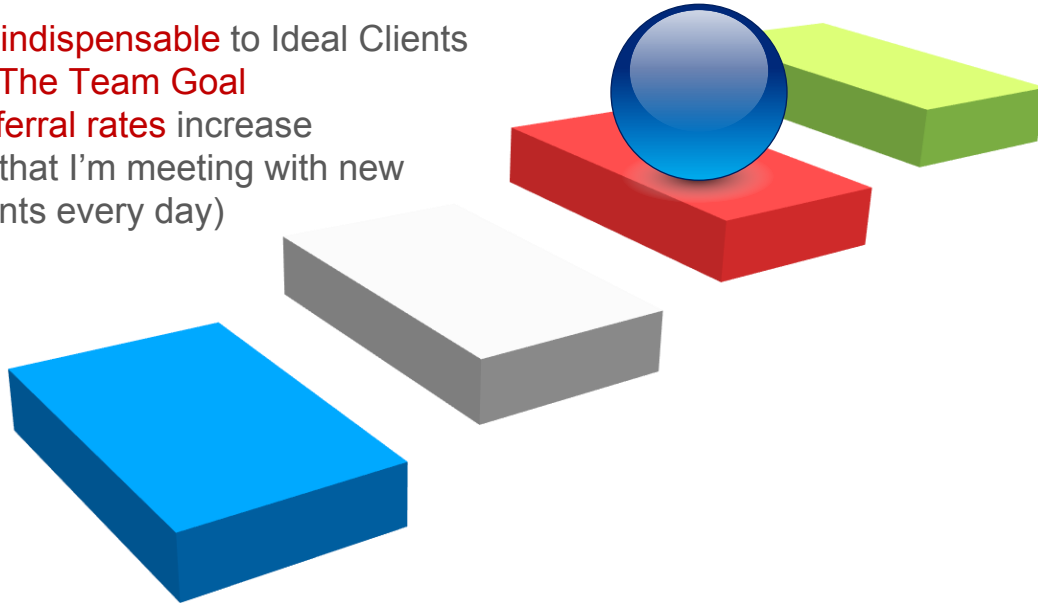


# Delivering on The Promise - **Extraordinary**

## Delivering an Extraordinary Client Experience

Our team won't stop increasing value to our clients until

- ✓ We become **indispensable** to Ideal Clients
- ✓ We achieve **The Team Goal**
- ✓ Our **client referral rates** increase  
(to the point that I'm meeting with new potential clients every day)



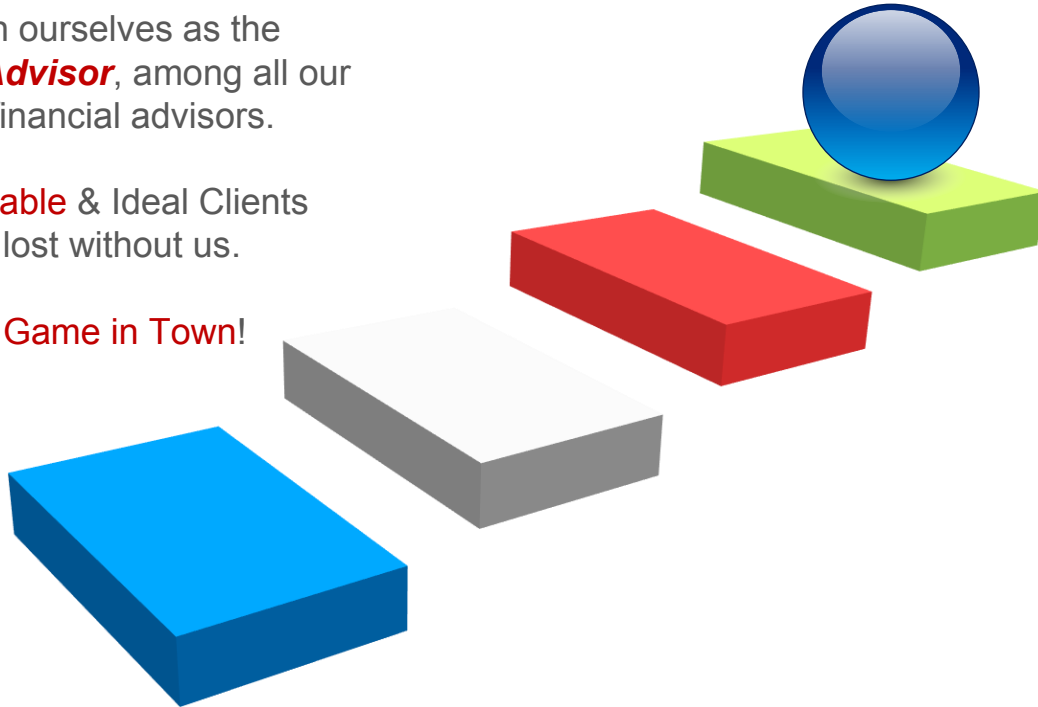
# Delivering on The Promise - **Trusted**

Become The **Most** Trusted Advisor

We will establish ourselves as the ***Most Trusted Advisor***, among all our client's various financial advisors.

We're **indispensable** & Ideal Clients tell us they'd be lost without us.

We're **The Only Game in Town!**



# Delivering on The Promise

We're a financial services **monopoly**

We're **the only game in town**.

For what we do, potential clients have **no other option** than utilizing us

Commitment to The Team Goal drives **unsolicited client referrals**



# Question

- ✓ Mark, I have a client who's paid me \$6k for the past year for Comprehensive Financial Services and is now coming up on their 1-year anniversary working with me.
- ✓ I'd like to elevate them to Ideal Client level at \$36,000/year
- ✓ But they've been a little difficult to work with this year.  
EX: I don't have access to view all their accounts in real time, thus don't know if they're on-track or off track to our plan.
- ✓ Could you walk me through the conversation you would have at The Annual Review™ with this Non-ideal Client?
- ✓ How do I make the case that someone who has ample assets should join my Ideal Client Community?

# The 5-Step Conversation

1. How important is your Financial Road Map® to you?  
How serious are you about these goals you've shared?
2. Are you on-track or off-track right now?
  - ✓ For each goal on FRM
    - ✓ How much did you ear-mark for this goal over the last 12-mo?
    - ✓ What was the goal? (did you hit the goal you set for funding this?)
3. What's the goal for the next 12-mo?
4. Based on working with you, you seem like you fit the profile of the client we serve best! Let's review our Ideal Client Profile and see if you agree.
5. Your options for continuing our work together
  - ✓ PLAN A – Invite to join Ideal Client Community (but only if fit the profile)
  - ✓ PLAN B – To continue working as we have, the fee for the next 12-months will be \$10,000 (to update their comprehensive written lifetime financial strategy – aka overarching plan)

**UPDATE**

**The Financial Road Map®**

**BEFORE each client  
progress meeting**

# Financial Road Map<sup>®</sup>

## for Living Life on Purpose

"There are those who travel and those who are going somewhere. They are different, and yet they are the same. Successful people have this over their rivals: they know where they are going."

Mark Caine

[www.BillBachrach.com](http://www.BillBachrach.com)

"What's Important to You?"



Where I Am Today

Cash Reserves		Growth/Income Assets	
Now	Be	Now	Be
\$44,000		\$100,000	
Debt		Insurance	
Now	Be	Now	Be
\$100,000			

See Insurance worksheet for lack of Financial Res. Mar

Name: LYNN

Name: TED



Goals

# Financial Road Map<sup>®</sup>

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### "What's Important to You?"



Where I Am Today			
Cash Reserves		Growth/Income Assets	
Now	Be	Now	Be
\$48,271		\$1,360,960	
Debt		Insurance	
Now	Be	Now	Be
\$973,552			

See Insurance worksheet on back of Financial Road Map<sup>®</sup>

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Now	Be	Now	Be
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Personal Goal Milestone  
**Financial Independence**  
 \$18,000/mo (after tax)

Jul 1, 2029

Personal Goal Milestone  
 [Blurred text]

Personal Goal Milestone  
**Our Dream Home**  
 \$2MM Home (\$200,000 down pymt)

Dec 25, 2025

Personal Goal Milestone  
**Debbie's College**  
 \$200,000

Aug 1, 2025



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OW: We hold **YOU** accountable to the plan  
 NW: **I'M** accountable

### "What's Important to You?"



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## Our Ideal Client

*The Client we serve the best has the following qualities:*

- **THEY ARE FINANCIAL DELEGATORS:** Our community of clients appreciate, and are happy to follow, the advice of a team of financial experts coordinated by a single Trusted Advisor.
- **THEY ARE PASSIONATE ABOUT GOALS:** Our clients realize that achieving their goals requires both money and planning. Our Ideal Clients appreciate our commitment to pay close attention to all the financial details and proactively make prompt recommendations to get back on track whenever inevitable course corrections are required.
- **THEY ENJOY SIMPLICITY:** Our clients enjoy the simplicity, freedom, and peace of mind that comes from having all their financial assets under the watchful eye of a single, Trusted Advisor. An advisor who provides oversight, coordinating all personal financial affairs. A single simple point-of-contact to chase down all the financial issues, hold everyone accountable, and ensure every recommendation from the team is perfectly aligned with the overarching strategy.
- **THEY VALUE OUR WORK TOGETHER:** Our clients appreciate advice and guidance. Due to the high level of client interaction and attention, our services make sense for families who have accumulated more \$5,000,000, not including the value of their home.
- **THEY FOCUS ON WHAT'S IMPORTANT:** Our clients delegate financial matters so they can focus their valuable time and energy on the things in their life that are most important to them. Clients who appreciate an advisor who views their role as to protect the financial assets, and the financial strategy, allowing clients to focus upon the things which matter most in life.
- **THEY APPRECIATE THE CANDID TRUTH:** Our clients want to hear the truth from us regarding their financial situation...no matter what. Clients who rely upon complete transparency from their advisor.

*Once we have a community of one hundred clients who meet this profile we will not be accepting any new clients.*



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5. Your options for continuing our work together.
  - ✓ PLAN A – Invite to join Ideal Client Community (but only if fit the profile)
  - ✓ PLAN B – To continue working as we have, the fee for the next 12-months will be \$10,000 (to update their comprehensive written lifetime financial strategy – aka overarching plan)

# Your options for continuing our work together

## OW: Keep working as we have

- ✓ **\$10,000 for the next 12-mo**
- ✓ I'll deploy my team to fully UPDATE your comprehensive written lifetime financial strategy (overarching plan)
- ✓ We'll meet every 6-mo for a progress update (2X per year)
- ✓ **YOU** are accountable for making sure everything that's supposed to get done, actually gets done. I create the list & you get it done.

## NW: Elevate our work together

- ✓ **\$36,000 for the next 12-mo**
- ✓ I'll deploy my team to fully UPDATE your comprehensive written lifetime financial strategy (overarching plan)
- ✓ We'll meet at least once every 4-mo for client progress meetings (3X+ per year & accountability calls in-between)
- ✓ **I'll** be accountable for making sure everything gets done.



My

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Pledge

To You

September 20, 2022

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My pledge to you...

Protection

Attention

Coordination

Transparency

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The Only Game in Town

Protection  
Attention  
Coordination  
Transparency