

Mark's 4-step Commitment to Hire Conversation

These Financial Road Map® Experience (FRME) mechanics represent custom additions to Bill Bachrach's standard scripting. So, in our methodology, this process replaces the standard Commitment to Hire Conversation™ Bill teaches. There are 3 additions that accompany the standard Commitment to Hire Conversation™ which Bill provides.

1. **The Ideal Client Profile Conversation:** *"Seems to me you fit the profile of the client we serve best. Do you mind if we look at it together & see what you think?"*
2. **The Commitment to Hire Conversation™:** [Below is the classic version. We have changed NOTHING.] *"We've come to the point in our time together where you get to decide if you want to hire me to create this comprehensive strategy for you..."*
3. **The Ten Pivotal Questions™:** Mastery level of all the responses to The Ten Pivotal Questions™ that we've provided you.
4. **The Expectations conversation™:** *"So, what do you expect from the relationship with a Financial Advisor like me?". "Our Team Goal is to consistently exceed your expectations. What would represent "going above & beyond" in your mind? What would that look like? What would we be doing for you?", "If we're sitting here a year from now, and we exceeded your expectations, share with me all the things we did for you."*
[PAUSE between each question above. Make sure you've received responses from BOTH spouses before moving on to the next question]

The Financial Road Map® Experience

Bill's CLASSIC Version of ***The Commitment to Hire Conversation™***
(the one Mark McKenna Little uses):

What you're looking at is your Financial Road Map® for living your life on purpose. We've come to the point in our time together when you get to decide whether or not you want to hire my team and me to create a comprehensive written lifetime financial strategy for you.

Now, let me tell you exactly what you'll get.

We'll create a comprehensive, step-by-step plan of action for you; telling you exactly what you need to do in all 5 areas of personal finance:
Financial Planning, Tax Planning, Estate Planning, Money Management & planning designed to avoid risks and increase safety.

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[NOTE: refer to *The Financial Road Map*®] For example, we'll tell you exactly how much you should have in Cash Reserves and how to get it there and keep it there.

We'll take a look at any and all debt to give you specific advice on how to reduce, and ultimately to eliminate, your debt on a schedule that makes sense for you.

We'll look at all the risks your facing and develop specific strategies to increase the safety of your overall strategy.

As a part of that we'll take a look at every type of insurance you own, such as auto, homeowner's policies, and every other kind of insurance you own so I can tell you 3 things:

- 1) If you need it at all
- 2) If so, what amounts you need, and ...
- 3) Exactly what type and kinds of insurance are right for you.

Then, we'll take a look at how your assets are allocated and we'll give you advice on how to best deploy or allocate those assets.

What you end up with is a comprehensive plan that's so thorough and so proactive that it gives you the highest probability of achieving your Goals.

And for you _____, (insert the Client's name) having achieved these goals is the evidence that you've made smart choices about your money so you can experience _____ [*One-by-one flow up each spouse's Values Staircase*™]

So, _____ and _____, the question on the table is pretty simple. (pause) Would you like to join our Ideal Client Community and have us create your overarching plan for you?