ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Monthly Session

Monthly Advice Session

December 20, 2022

With Host Mark McKenna Little

Marque Little ▼

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Welcome to Advisor PACT™ Monthly

Congratulations—you've taken the first step towards delivering Truly Comprehensive Financial Services by joining the Advisor PACT™ Monthly program.

First Steps

Before diving into your first module, we recommend reviewing some of the basics of the Advisor PACT philosophy that drives all of our courses and content. Block two hours on your calendar to watch the video below in its entirety, in which Mark walks through the 4 things that every client wants from a financial advisor, but can't find anywhere.

Upcoming Events

Monthly Q & A Session (Nov 2022)
Nov 15, 2022 08:00 AM - 09:00 AM — Webinar

Monthly Q & A Session (Dec 2022)
Dec 20, 2022 08:00 AM - 09:00 AM — Webinar

Monthly Q & A Session (Jan 2023)
Jan 17, 2023 08:00 AM - 09:00 AM — Webinar

Upcoming events...

News

Holiday Closure: December 24, 2022 - January 1, 2023
Nov 01, 2022

Holiday Closure - November 24, 2022
Aug 24, 2022

AdvisorPACT (and Toolkit) NOT Affected by the Log4j Vulnerability Discovered Last Week.
Dec 15, 2021

The Referability Dashboard™ (TRD) Has Been Updated
May 21, 2021

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

More news...

https://advisorpact.com/useractions

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
https://themarkofmastery.com/

Questions

- ✓ What should I set as my New Year’s Resolution?
- ✓ TA Tracking – NEW FEATURE Rollout
  - ✓ Last month, you mentioned we would be receiving a tracking sheet so that you can custom-tailor your advice closer to what I need. What’s the status of that?
- ✓ Explaining pricing to a potential client for “Overarching plan-ONLY” clients
  - ✓ How do you break-down the pricing of a comprehensive written lifetime financial strategy (overarching plan) for a potential client who’s a NIC?

Question

- ✓ What should I set as my New Year’s Resolution?

IT'S TRUE

Most People Break Their Resolutions!

(The only question is WHEN)

I RECOMMEND YOU MAKE THEM ANYWAY

BUT…

Don't Ask: Who am I?

Instead Ask: Who do I want to be?

(Actionable, aspirational, pursuing excellence)

That's Why

…I RECOMMEND YOU MAKE THEM ANYWAY

BETTER…

The Quality of Life Enhancer Exercise™

Pg 83 In the book
Values-Based Financial Planning

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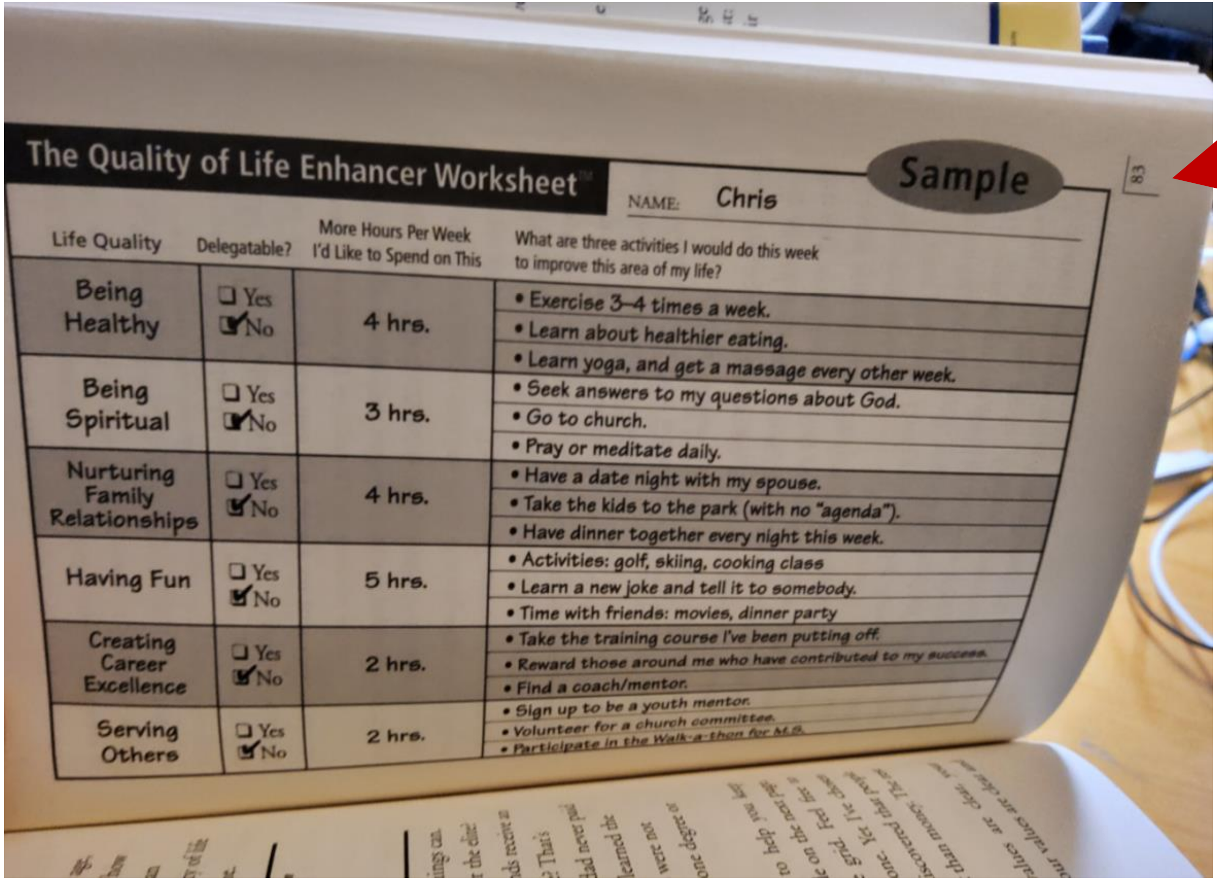


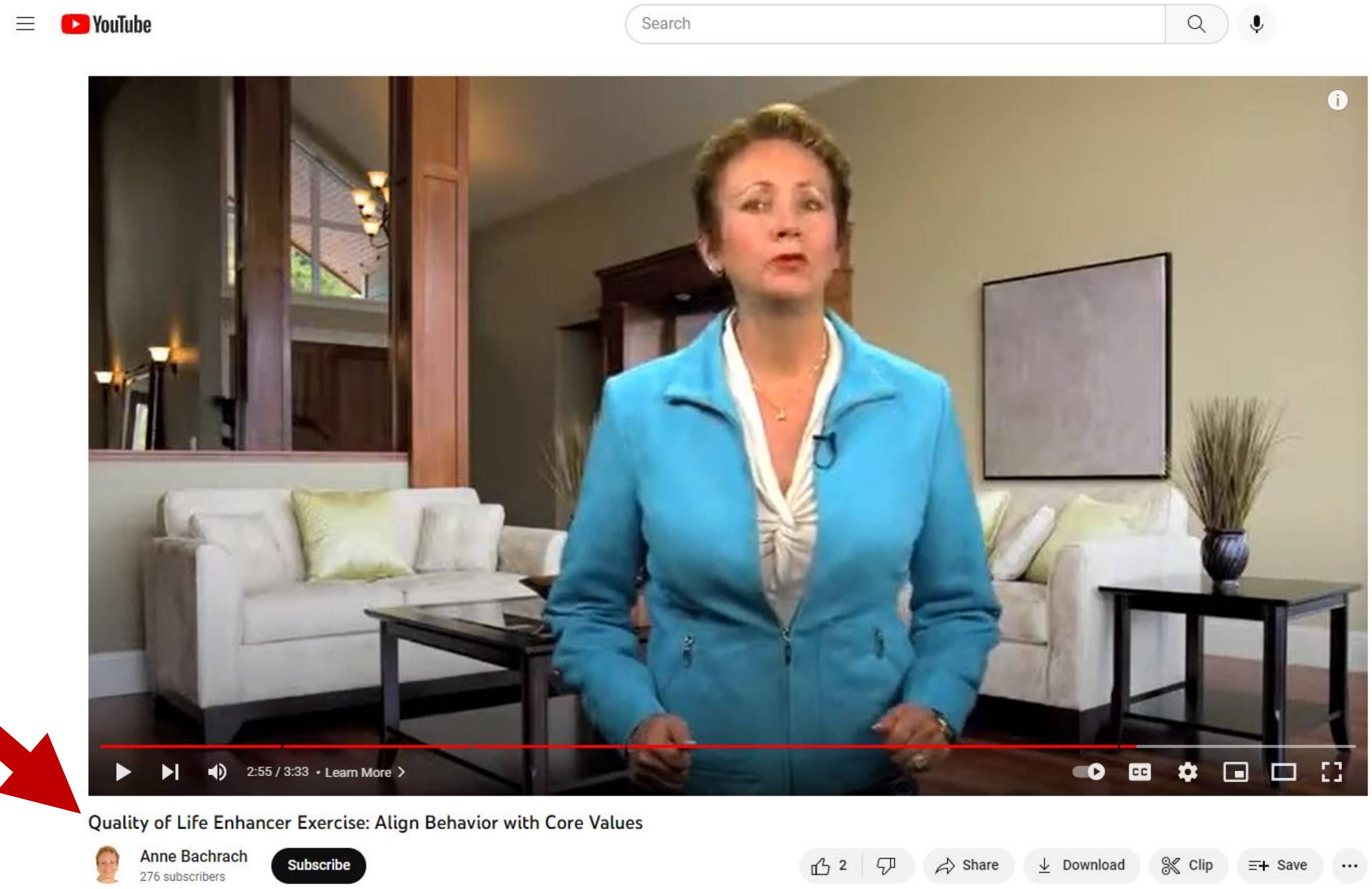
The Quality of Life Enhancer Worksheet™

Sample

NAME: Chris

83

Life Quality	Delegatable?	More Hours Per Week I'd Like to Spend on This	What are three activities I would do this week to improve this area of my life?
Being Healthy	❑ Yes ☑ No	4 hrs.	• Exercise 3–4 times a week. • Learn about healthier eating. • Learn yoga, and get a massage every other week.
Being Spiritual	❑ Yes ☑ No	3 hrs.	• Seek answers to my questions about God. • Go to church. • Pray or meditate daily.
Nurturing Family Relationships	❑ Yes ☑ No	4 hrs.	• Have a date night with my spouse. • Take the kids to the park (with no "agenda"). • Have dinner together every night this week.
Having Fun	❑ Yes ☑ No	5 hrs.	• Activities: golf, skiing, cooking class • Learn a new joke and tell it to somebody. • Time with friends: movies, dinner party
Creating Career Excellence	❑ Yes ☑ No	2 hrs.	• Take the training course I've been putting off. • Reward those around me who have contributed to my success. • Find a coach/mentor.
Serving Others	❑ Yes ☑ No	2 hrs.	• Sign up to be a youth mentor. • Volunteer for a church committee. • Participate in the Walk-a-thon for M.S.



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Question

- ✓ TA Tracking – NEW FEATURE Rollout
  - ✓ Last month, you mentioned we would be receiving a tracking sheet so that you can custom-tailor your advice closer to what I need. What's the status of that?

UPDATE

Your Weekly Tracking is Key!

(Look for that email from us ...but this service is optional)

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UPDATE

Here's what TA-Tracking Is
Here's what TA-Tracking Isn't

(This service is optional,
BUT, if you want this to be your BEST YEAR,
you'll invest 5-min & track your weekly activity)

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Question

- ✓ Explaining pricing to a potential client for “Overarching plan-ONLY” clients
  - ✓ How do you break-down the pricing of a comprehensive written lifetime financial strategy (overarching plan) for a potential client who’s a NIC?

The Commitment to Hire Conversation™

1. Meets **Ideal Client Profile**
2. Does **NOT** meet Ideal Client Profile
   But DOES meet your **NIC Profile**
3. Polite **Disengagement**!

If meets my NICP, AND they have ample funds to pay for an overarching plan

1. "We've come to the point in our time together where you get to decide whether you want to hire me to create a plan for making this FRM a reality. (complete the CTH) Would you like to do that?"
2. They always ask questions (such as …cost?)
3. "It will be $20,000 to create your comprehensive written lifetime financial strategy"
4. Always more questions follow (The 10 Pivotal Questions)

It's the SAME "next step" in either case

(The same SMEs will follow the exact same process for creating a CWLFS – an overarching plan)

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After CTH

Respond to their questions using The Ten Pivotal Questions™

(Responses to EVERY question any potential ideal client will have)

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The Only Game in Town

Protection
Attention
Coordination
Transparency