ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Monthly Session

Monthly Advice Session

April 18, 2023

With Host Mark McKenna Little

Questions

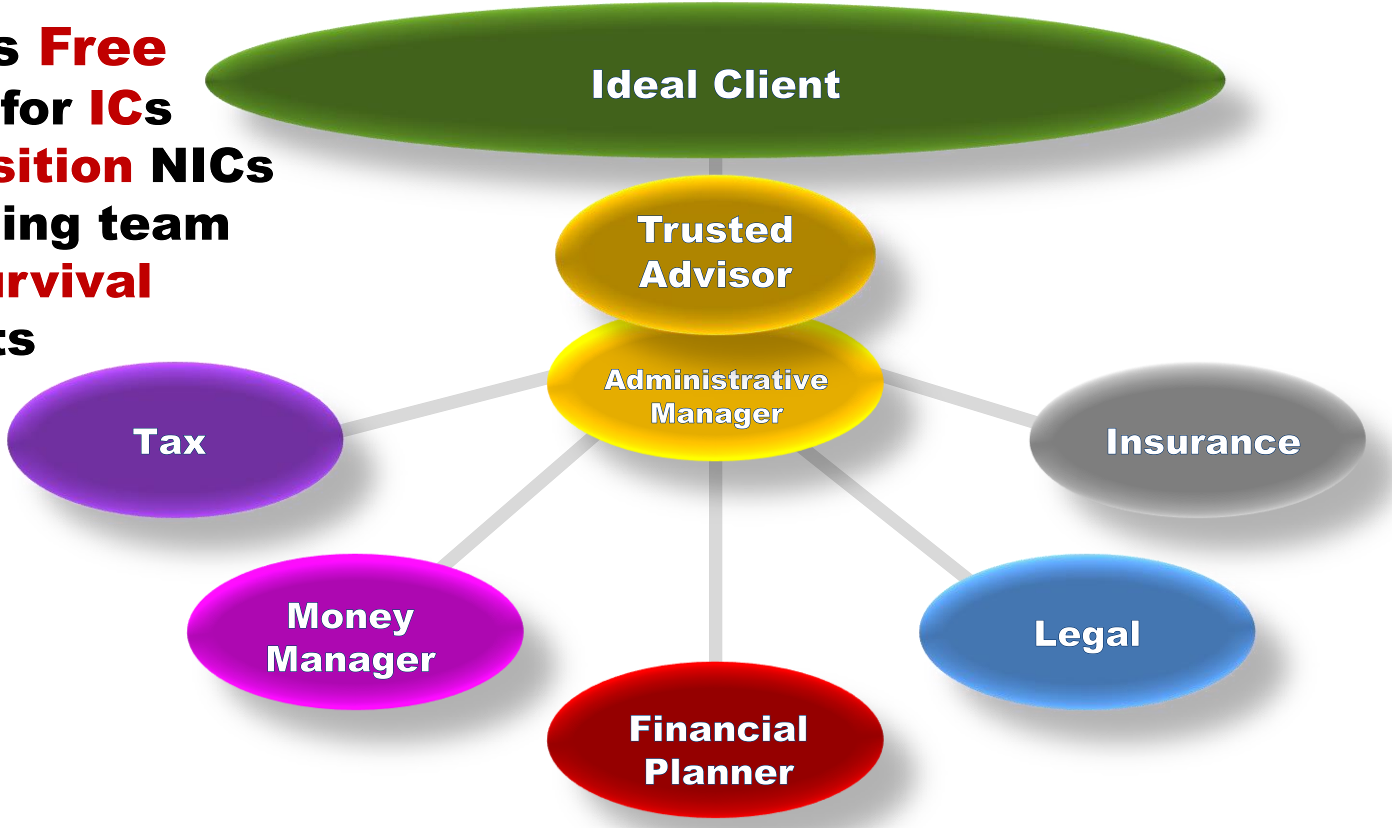
- ✓ I can’t afford to hire a team of SMEs right now, so how do I serve clients (NICs) in the meantime?
- ✓ Mark, I’ve heard you discuss Client Acquisition by establishing personal relationships first, could you fly through your methodology from a high level? Didn’t you say there are 3-skills or projects?
- ✓ You send me an email encouraging me to track my business activity each week. What am I looking for? What are the good habits I need to develop?
- ✓ I heard you say Financial Advisors need to have an “Entrepreneurial Instinct” to be successful in this business. What do you mean? & what is the most important SUCCESS TRAIT? Are there any traits that, if missing, drives failure?
- ✓ Our firm is known for its excellent Money Management. Our Money Management Team is spectacular & clients are here because of the unique way we manage money. How do I merge Advisor PACT™ into our reputation?

Questions

- ✓ I can’t afford to hire a team of SMEs right now, so how do I serve clients (NICs) in the meantime?

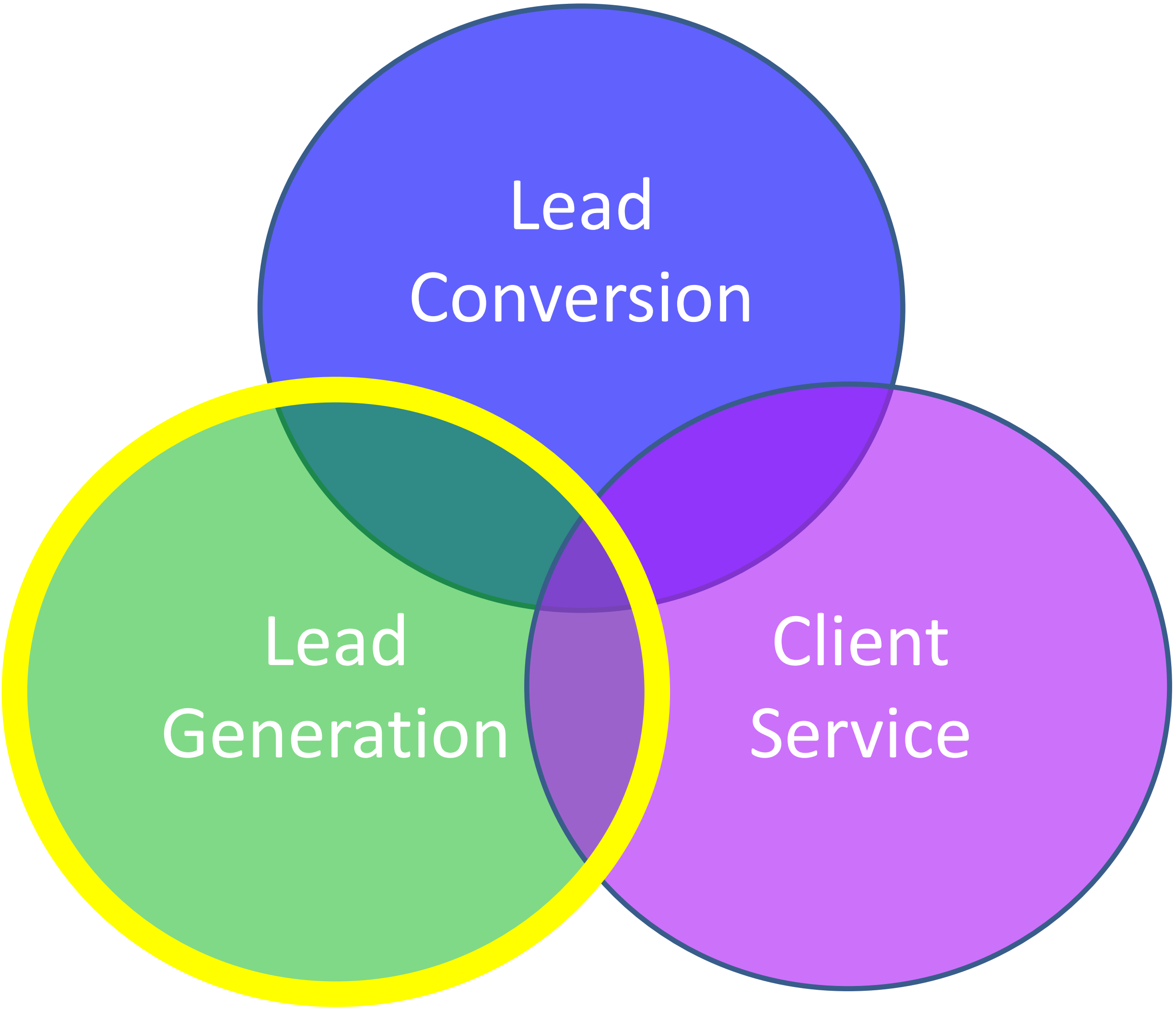
Our Deliverables Team Structure

Team is Free
- ✓ Free for ICs
- ✓ Transition NICs
- ✓ Existing team for Survival Clients



Questions

✓ Mark, I’ve heard you discuss Client Acquisition by establishing personal relationships first, could you fly through your methodology from a high level? Didn’t you say there are 3-skills or projects?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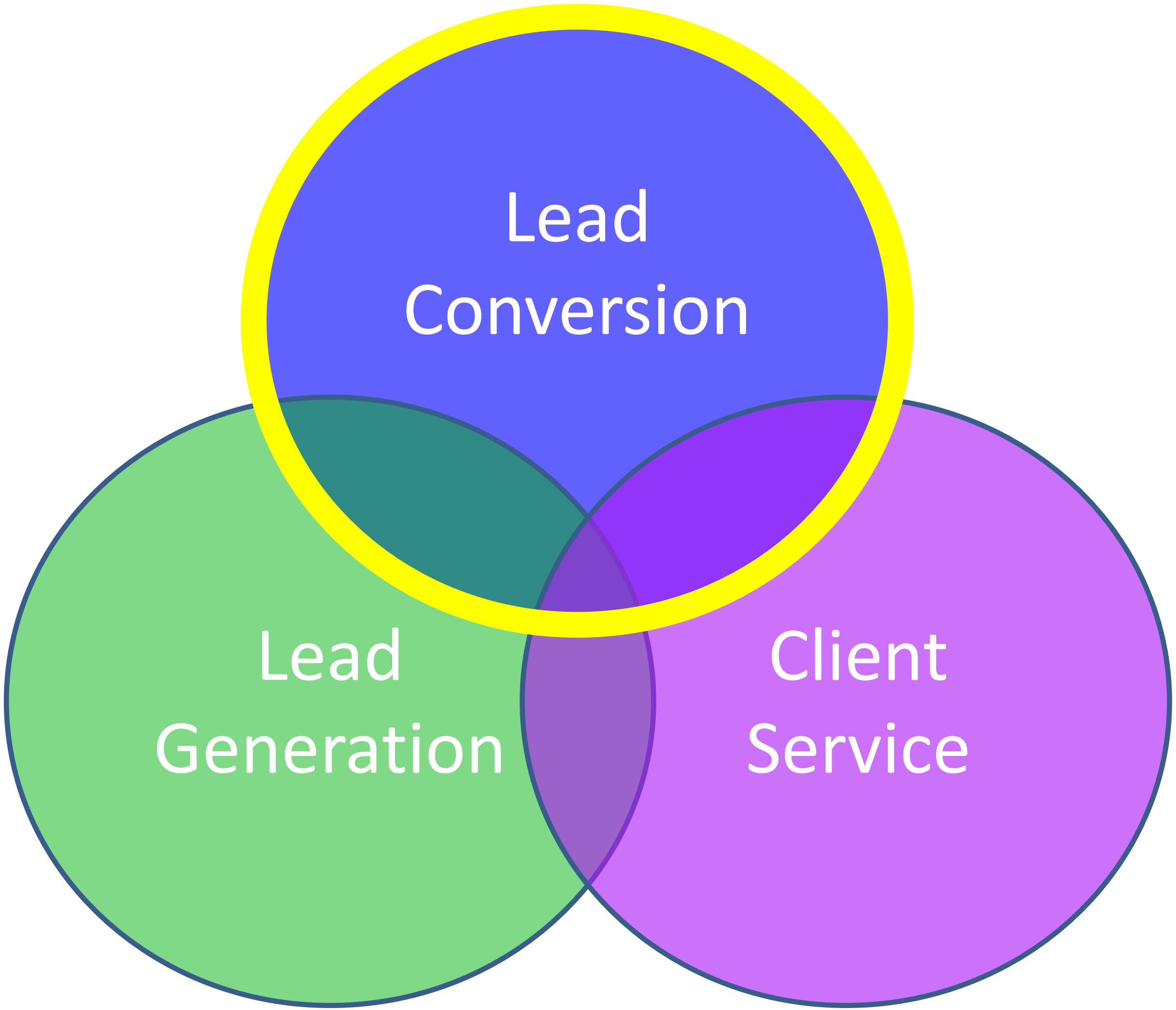
Client
Service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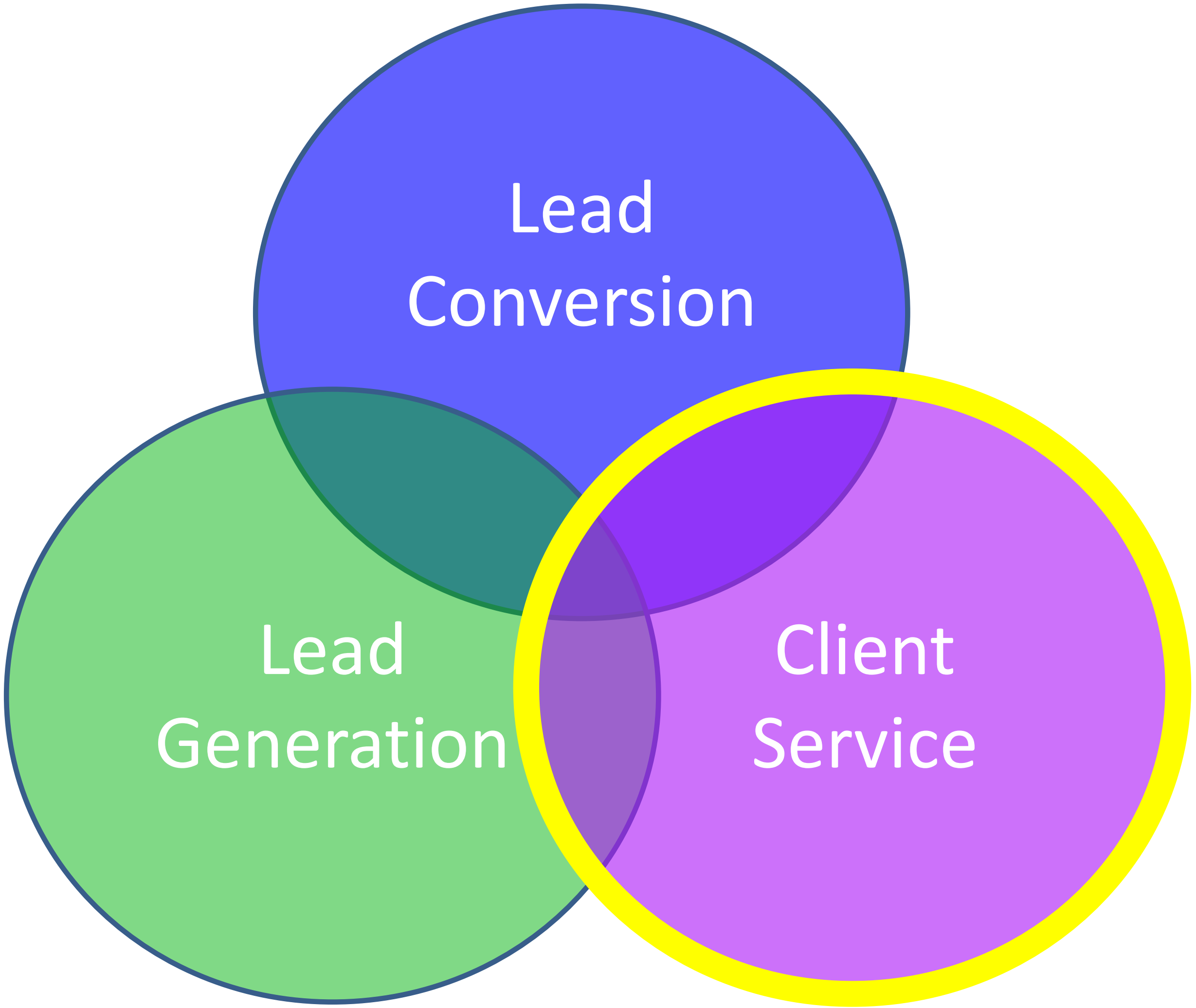
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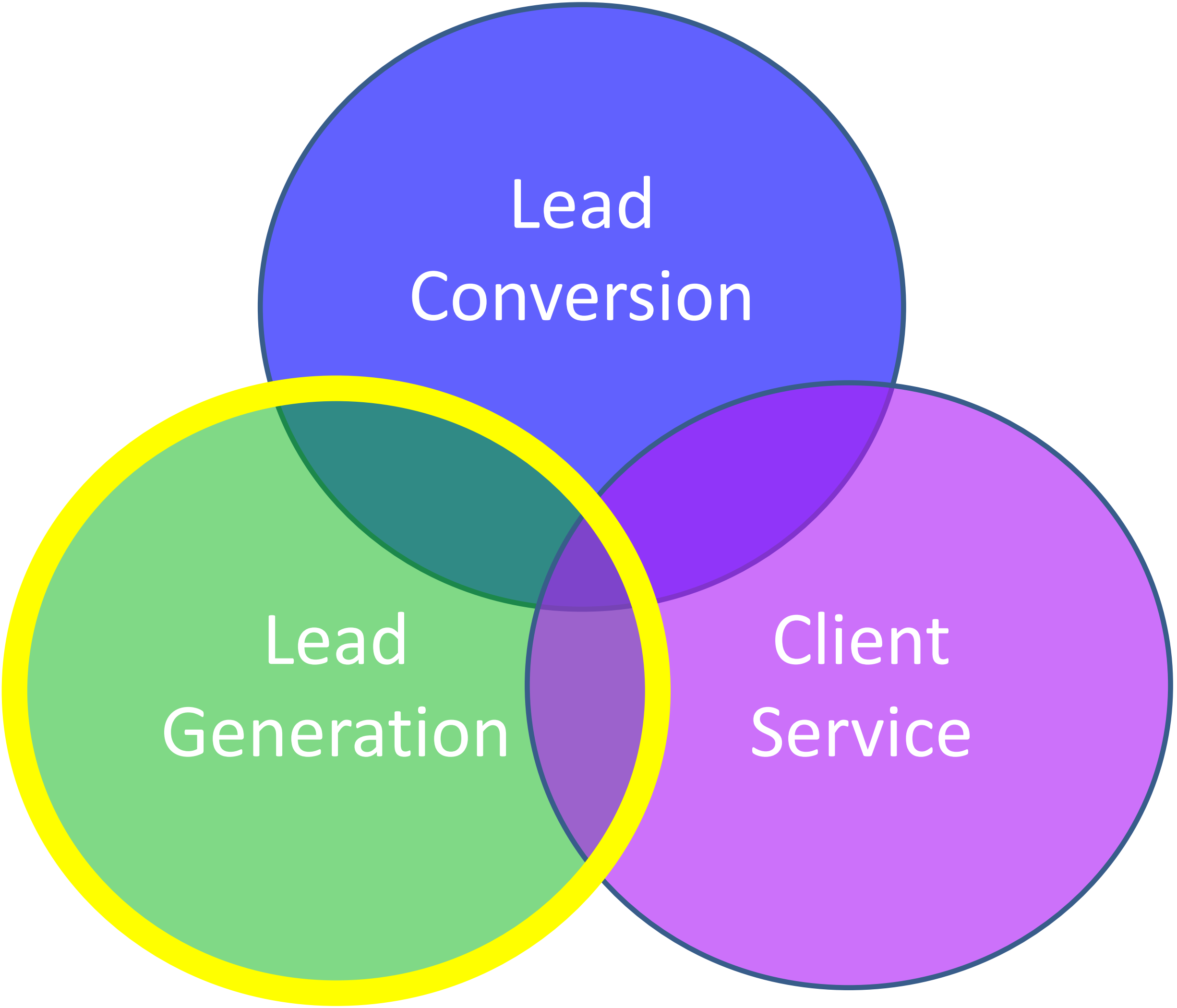
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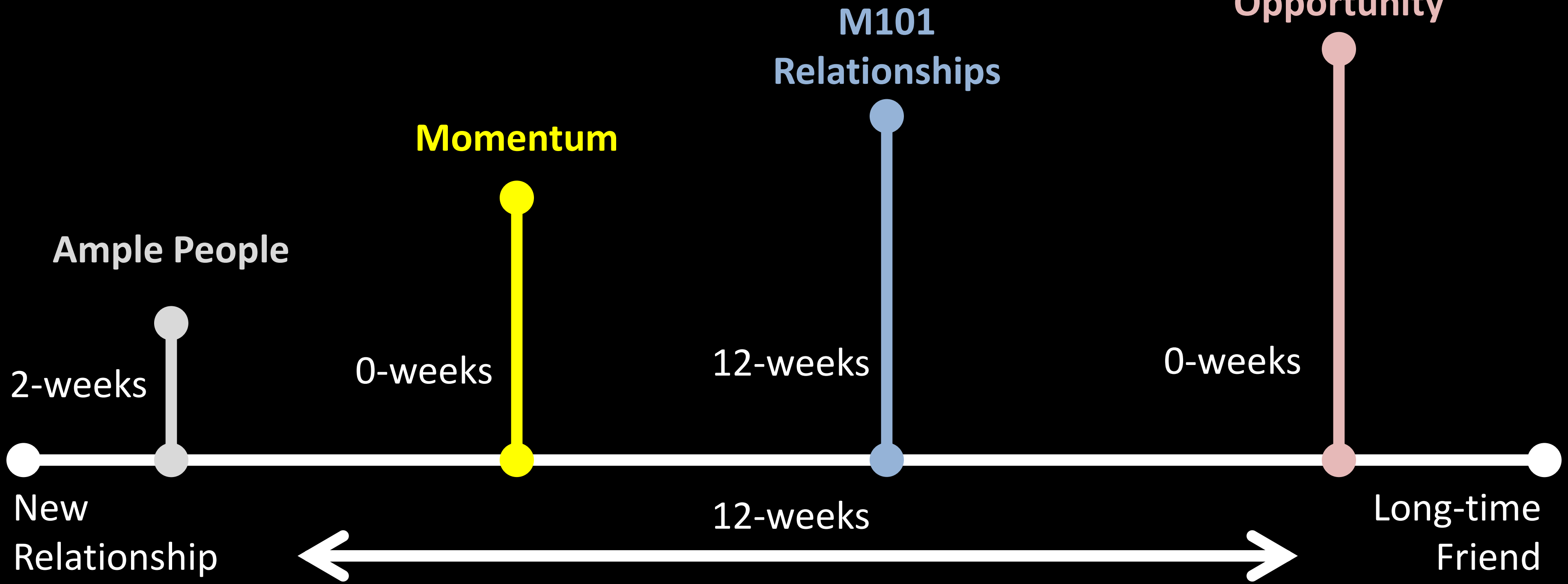
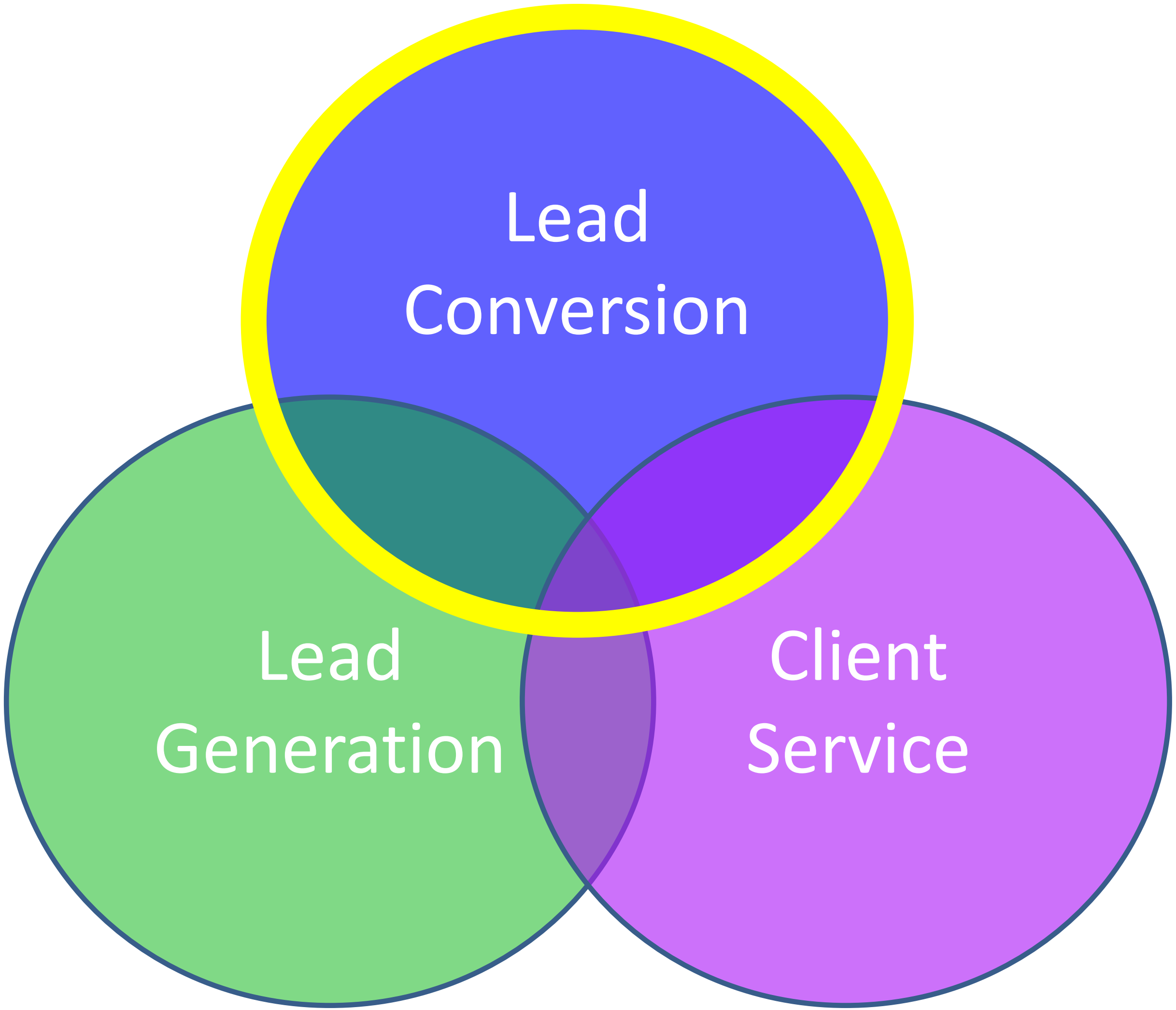
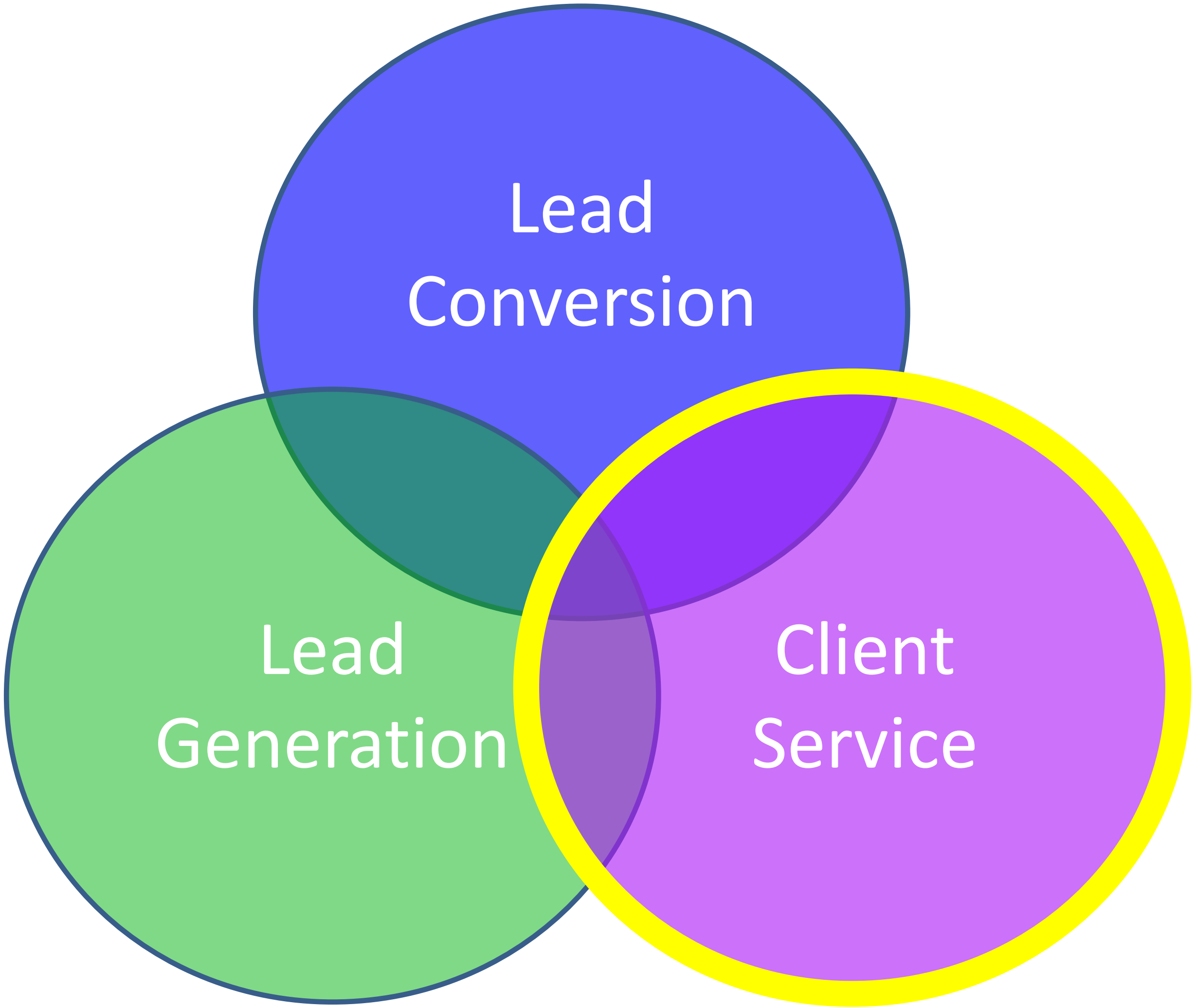
GMME

The Greatest Marketing Machine Ever Devised
for Financial Advisors (GMME)




Lead Conversion
Lead Generation
Client Service


Lead Conversion
Lead Generation
Client Service

ADVISOR | PACT™

A New Financial Advisor Paradigm

Protection
Attention
Coordination
Transparency

Truly Comprehensive Financial Services™

Questions

- ✓ You send me an email encouraging me to track my business activity each week. What am I looking for? What are the good habits I need to develop?

[TRACKING] External Referability - McKenna Louise Little

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Week #	Week of... (weekly start date)	# New TRFs created this week	# TRF Meetings This week NEW PEOPLE	# TRF Meetings This week EXISTING TRF UPDATE MEETINGS	Total # TRF Meetings This Week	# Consecutive Weeks of 10+ TRF Meetings	# Consecutive Weeks where at least 1/2 are Meeting 4+	# Current Ideal Clients	# Current Non-ideal Clients	# Initial Client Interviews™ Conducted This Week (ICIs are the same as FRMs)	Total # TRFs (count)	# of Names on LEIK Tab
		New TRF Forms you initiatied this week, even if you haven't yet met (new people you were introduced to this week)	# of first-time TRF meetings (even with past friends & acquaintances)	# of subsequent TRF meetings with people you've already met with before (TRF Update Meeting)	This column automatically calculates the total of the 2 previous columns	The total number of consecutive weeks that at least 10 TRF Meetings were completed. Count starts over if a week with less than 10 occurs. Also, skip weeks of planned absences (vacation, etc).	The total number of consecutive weeks where at least 50% of the TRF Meetings are "meeting #4" or greater. Count starts over if a week with less than 10 occurs. Also, skip weeks of planned absences (vacation, etc).	Total number of current clients who meet our Ideal Client Profile	Total number of current clients who do NOT meet our Ideal Client Profile, but who DO meet our Non-ideal Client Profile	In this column, list the number of initial appointments you completed w/ potential clients who wanted to sit down and "talk business"	How many total TRFs exist? These are files you maintain on all personal relationships.(i ndividuals not couples)	Current TOTAL number of names on your "Literally Everyone I Know" tab (LEIK count)
Week #1	Monday, January 2, 2023	10	4	7	11	1	0	22	19	0	818	2218
Week #2	Monday, January 9, 2023	12	5	6	11	2	0	22	20	2	830	2230
Week #3	Monday, January 16, 2023	11	4	8	12	3	1	23	22	5	841	2241
Week #4	Monday, January 23, 2023	21	5	6	11	4	0	23	24	1	853	2253
Week #5	Monday, January 30, 2023	17	3	7	10	5	0	23	24	2	864	2264
Week #6	Monday, February 6, 2023	15	2	12	14	6	0	23	27	3	876	2276
Week #7	Monday, February 13, 2023	22	10	5	15	7	1	23	28	4	887	2287
Week #8	Monday, February 20, 2023	20	18	2	20	1	0	23	29	0	907	2307
Week #9	Monday, February 27, 2023	19	16	4	20	2	0	23	30	1	926	2326
Week #10	Monday, March 6, 2023	22	8	9	17	3	1	24	30	0	947	2348
Week #11	Monday, March 13, 2023	27	9	9	18	4	2	24	31	1	966	2368
Week #12	Monday, March 20, 2023	26	9	10	19	5	3	24	33	2	989	2389
Week #13	Monday, March 27, 2023	22	8	9	17	6	4	24	33	0	1010	2411
Week #14	Monday, April 3, 2023	21	10	8	18	7	5	24	34	1	1035	2435
Week #15	Monday, April 10, 2023	20	12	13	25	8	6	25	36	2	1061	2462
Week #16	Monday, April 17, 2023	0	0	0	0	0	0			0	0	0
Week #17	Monday, April 24, 2023	0	0	0	0	0	0			0	0	0
Week #18	Monday, May 1, 2023	0	0	0	0	0	0			0	0	0
Week #19	Monday, May 8, 2023	0	0	0	0	0	0			0	0	0
Week #20	Monday, May 15, 2023	0	0	0	0	0	0			0	0	0

WEEKLY HABIT:
Organizing & Reviewing Opportunities

1. LEIK LIST: Review opportunities with non-clients on your "Literally Everyone I Know" tab

2. ARR List: Review opportunities with current clients on your Annual Recurring Revenue Exercise™

Questions

- ✓ I heard you say Financial Advisors need to have an “Entrepreneurial Instinct” to be successful in this business.
- ✓ What do you mean?
- ✓ & what is the most important SUCCESS TRAIT?
- ✓ Are there any traits that, if missing, drives failure?

Entrepreneurial Instinct

Questions

- ✓ I heard you say Financial Advisors need to have an “Entrepreneurial Instinct” to be successful in this business.
- ✓ What do you mean?
- ✓ & what is the most important SUCCESS TRAIT?
- ✓ Are there any traits that, if missing, drives failure?

Urgency & Action Bias

Questions

- ✓ Our firm is known for its excellent Money Management.
- ✓ Our Money Management Team is spectacular
- ✓ Clients are here because of the unique way we manage money.
- ✓ Our consistent performance is way above average
- ✓ How do I merge Advisor PACT™ and your methodology into our reputation?

Are you in the **right** program?

Clients value our Money Management

- ✓ We're known & respected for our Money Management Skills (methods, performance, whatever)
- ✓ Our Money Management Team is TOP-TIER (better)
- ✓ We're the best at ____ (blah blah)
- ✓ **Us, Us, Us**

v. We'll get you to your goals

1. You'll always be on-track to your goals (or we'll proactively get you back on-track)
2. You'll never miss a planning opportunity (& no Surprises)
3. You're making BETTER financial decisions in all areas

✓ **You, You, You**

The 3 Bottom-line Client Outcomes

1. **Remain On-track To Goals**

2. **Proactive on all financial issues**

3. **Make better financial decisions**
   … in all areas of personal finance

The 3 Bottom-line Client Outcomes

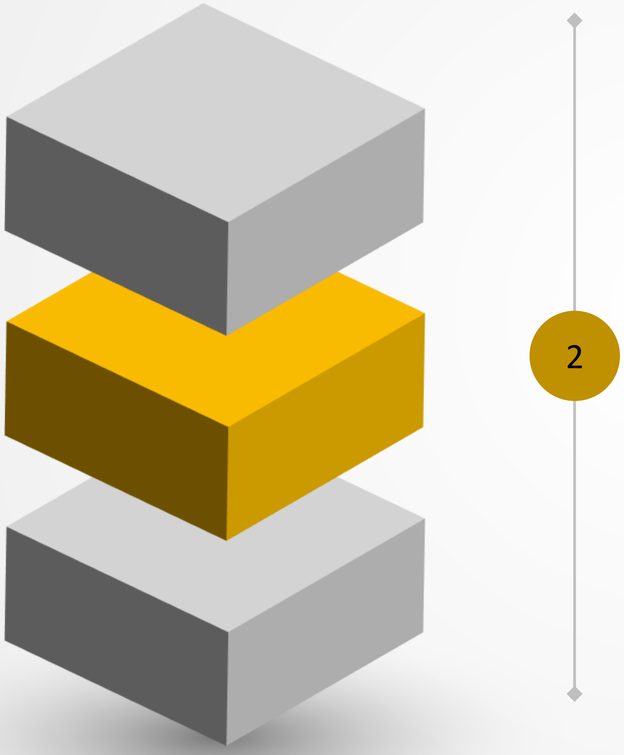
What's it worth to you to always know…

1

…You're On-track To Goals

- ✓ We'll Establish and maintain a plan in every area of your financial life
- ✓ We'll Measure progress benchmarked against your goals
- ✓ You'll be on-track in all areas of finance
(or we'll have the course-correction required in writing)
- ✓ We'll meet at least once every 4 months to confirm that you're on-track

The 3 Bottom-line Client Outcomes



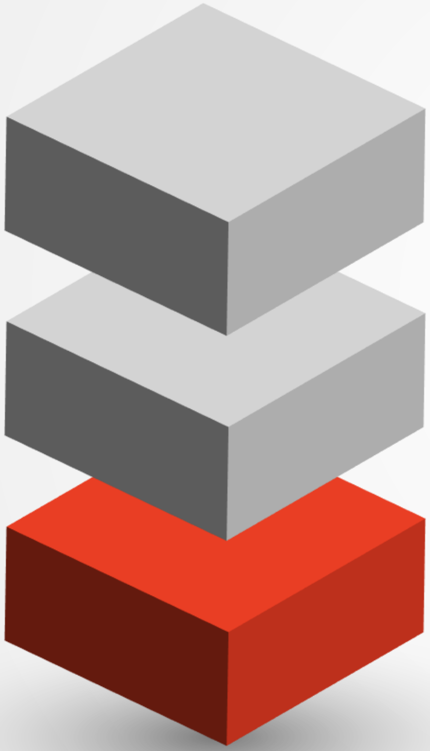
What's it worth to you to always be so…

Proactive on financial issues

- ✓ You'll never miss any financial opportunity?
- ✓ You'll never have any financial surprises?

- ✓ Tax Planning
- ✓ Estate Planning
- ✓ Insurance Planning
- ✓ Financial Planning

The 3 Bottom-line Client Outcomes



What's it worth to you to always know…

3

You're making better financial decisions…

…In all areas of finance along the way?

- ✓ All Major purchases
- ✓ Tax strategies & tactics
- ✓ Estate Planning strategies & tactics
- ✓ Cash management strategies & tactics
- ✓ Financial asset & Investment strategies & tactics
- ✓ Insurance (risk management) strategies & tactics
- ✓ Travel (foreign currencies)
- ✓ Etc, Etc, Etc…

- ✓ Every major financial decision is studied by our team

MOM Lexicon: Guide to the vernacular we use in The Mark of Mastery programs (our shared lingo)

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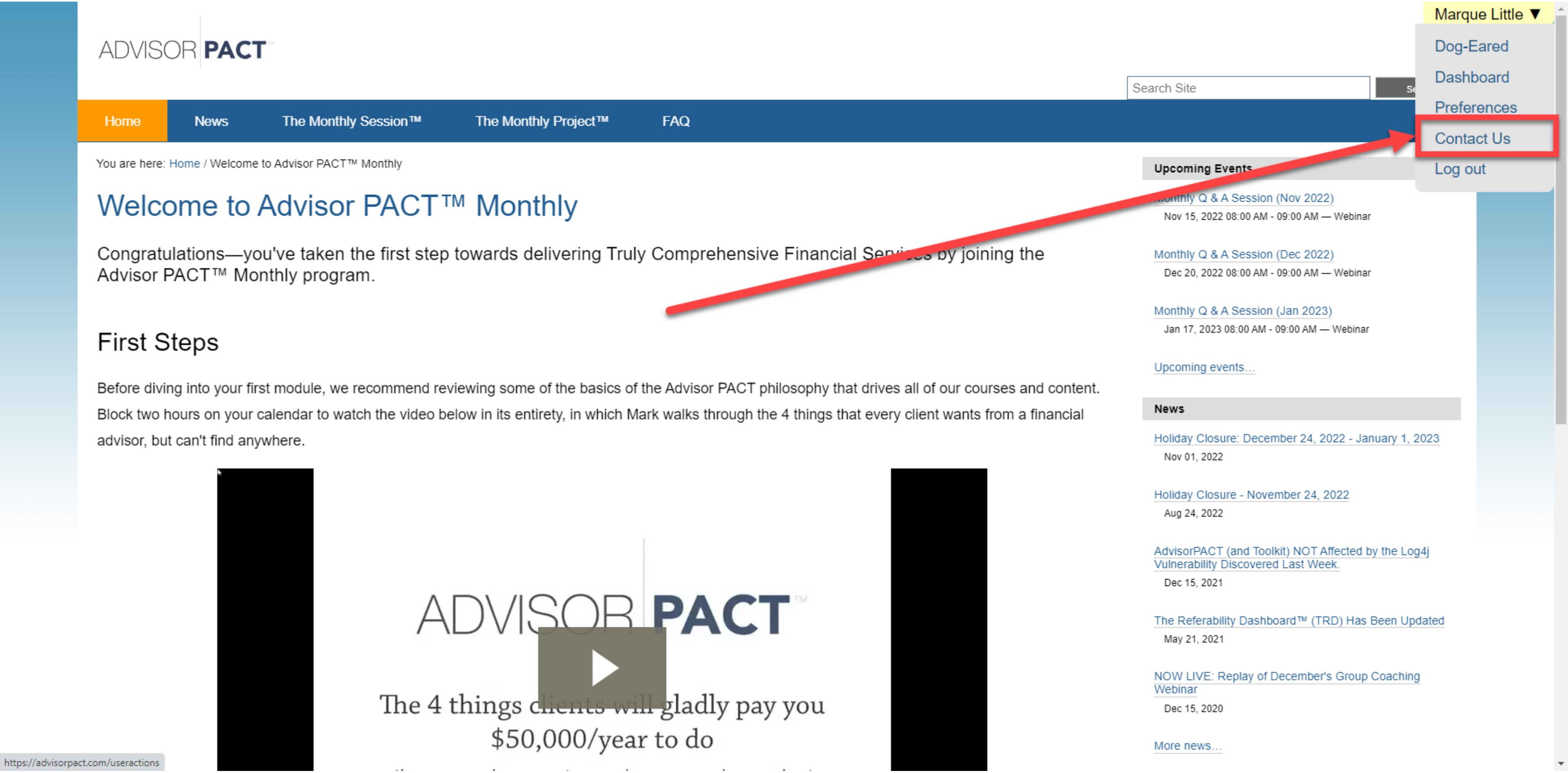
C25 | One of the meetings in The Three Meeting Process™

Abbrev	Term	Definition or explanation
CSRE	The Comprehensive Safety Review Exercise	The Ideal Client exercise conducted during The Comprehensive Safety Review™ (CSR)
CYA	The Correct Your Aim™ (CYA) client exercise	The Ideal Client exercise conducted during The Annual Review™ (TAR)
DCP	Deliverables Checkpoints™	Truly Comprehensive Financial Services™ = The Ten Client Deliverables™ = 142 Deliverables Checkpoints™
DRPM	The Dry-Run Prep Meeting™	The internal dress rehearsal 7-days prior to a client progress meeting with any Ideal Client
DSM	The Deal Structure Meeting™	The third of 3 meetings in the DTRP in this process of elimination (you'll conduct the DSM only with the final SME you've selected to join your team)
DTM	Deliverables Team Member	Any member of your team who is responsible for contributing in any way helping deliver on the promises that have been made to your clients (both Ideal Cli
DTRP	The Deliverables Team Recruitment Process™	The 12-step process for filling one SME vacancy in less than 60-days
FAM	[illegible]nancial Ad[illegible]stery Program	The one-on-one [illegible]sulting program that we offer month-to-month
FAWT	[illegible]kly Trac[illegible]T)	Key Financial A[illegible]r performance measures (KPMs) for the Client Acquisition Proje[illegible]Weekly tracking of key metrics for F[illegible]activity for new business goa
FCRs	[illegible]e Critic[illegible]ep[illegible]™	[illegible]sum[illegible]ar[illegible]ated[illegible]f the[illegible]p[illegible]nal fin[illegible](each repo[illegible]eated[illegible]the S[illegible]le for[illegible]are
FIRP	[illegible]shi[illegible]The[illegible]ght[illegible]ds	"circles" all[illegible]s move[illegible]in: Ou[illegible]ily,[illegible]ds, collea[illegible]s, ch[illegible]n, hobbies, t[illegible]are[illegible]xamp[illegible]f "circ[illegible]or p[illegible]we might operate
FRM (FRME	[illegible]e Fi[illegible]ia[illegible]oad M[illegible]®	als[illegible]as T[illegible]Financ[illegible]e (FRME)
GMME	[illegible]e GM[illegible]urse	The Gre[illegible]st M[illegible]ting Ma[illegible]e Ever Devise[illegible]Financial A[illegible](GMME) a Cli[illegible]Acqui[illegible]n cou[illegible]availab[illegible]roug[illegible]e M[illegible]of Mastery™ https://
GPO	[illegible]e Goa[illegible]gress O[illegible]ok™	One of the meetings in The Three Meeting Process™
GPS (TIP)	The Greatest Probability Strategy™ (GPS)	also known as The Implementation Plan (TIP). The Greatest Probability Strategy™ (GPS) step-by-step implementation plan-of-action.
HPC	The Highest Priority Conversation™	The most important conversation that needs to be conducted [illegible]he Ideal Client at the next client progress meeting
IC	Ideal Client	An individual who meets ALL of the criteria listed in our Ideal Client Profile, not just a few criteria, but ALL of the criteria.
ICI (FRME)	The Initial Client Interview™	also known as The Financial Road Map Experience (FRME)
ICP	Ideal Client Profile	Every Trusted Advisor has an Ideal Client Profile detailing the profile of the client best served by the firm.
IDM	The Initial Discovery Meeting™	The first of 3 meetings in the DTRP in this process of elimination
KPMs	Key Performance Measures	Key metrics that measure success for each Deliverables Team Member. There are different KPM tracking sheets for AMs, SMEs & Trusted Advisors
LEIK	"Literally Everyone I Know"	A list maintained by every Financial Advisor with the names of Literally Everyone they Know. A long list of people (individual names) known by the Financia
M101	Marketing 101 Make a List Project	A Client Acquisition Project
MISC	The MISC Organizer™	Also known as The Relationship File™ (TRF). MISC is an acronym (Meaningful, Important, Significant, Compelling information about a person)
MOM	The Mark of Mastery™	https://themarkofmastery.com/ A free website for Financial Advisors introducing concepts developed by Mark McKenna Little for consistently exceeding Ide
NIC	Non-ideal Client	A Non-ideal Client is someone who does NOT meet our Ideal Client Profile
NICP	Non-ideal Client Profile	If Non-ideal Clients are being accepted, then there also needs to be a Non-ideal Client Profile created (establishing the minimum standards)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You are here: Home / Welcome to Advisor PACT™ Monthly
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.
ADVISOR PACT
The 4 things clients will gladly pay you $50,000/year to do
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/

ADVISOR PACT™

The Only Game in Town

Protection
Attention
Coordination
Transparency