ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Monthly Session

Monthly Advice Session

July 18, 2023

With Host Mark McKenna Little

Questions

- ✓ I charge $36,000/year for Truly Comprehensive Financial Services, but there are no Ideal Clients in my area.

- ✓ You've mentioned that when people ask you what you do, you tell them. But what do you do if they keep asking details about what you do?

- ✓ I just had a client leave me for greener pastures (another Financial Advisor), what can I do to retain clients?

Question

- ✓ I charge $36,000/year for Truly Comprehensive Financial Services, but there are no Ideal Clients in my area.

Call me skeptical

But even if it’s true…

You’re not a tree!

How **many** Initial Client Interviews per **week**?

For me… Goal = 5 Actual = 2 (for year 1)

& my ratio is 7.8:1

You charge $36k/yr
Who is your Ideal Client?

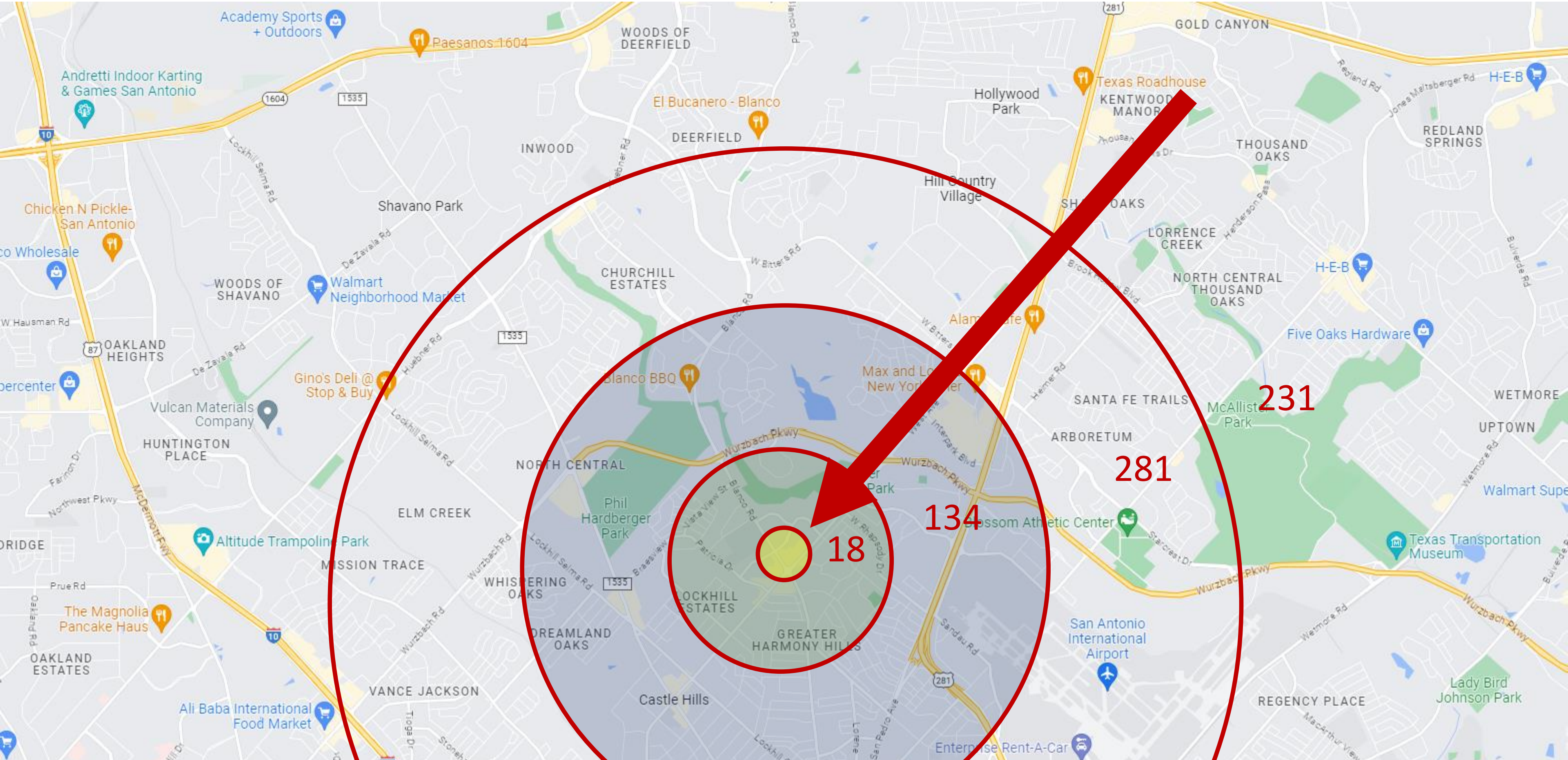
Financial delegator

Serious about your goals

Appreciates advice

Has financial assets of $3,600,00+

Client Acquisition Mapping



The more common problem is Lead Generation

Failure to have enough people who want to sit down & "talk business"

SOLUTION:

Seriously Ramp-up

Hours 20 Client Acquisition

Lead Generation Activity

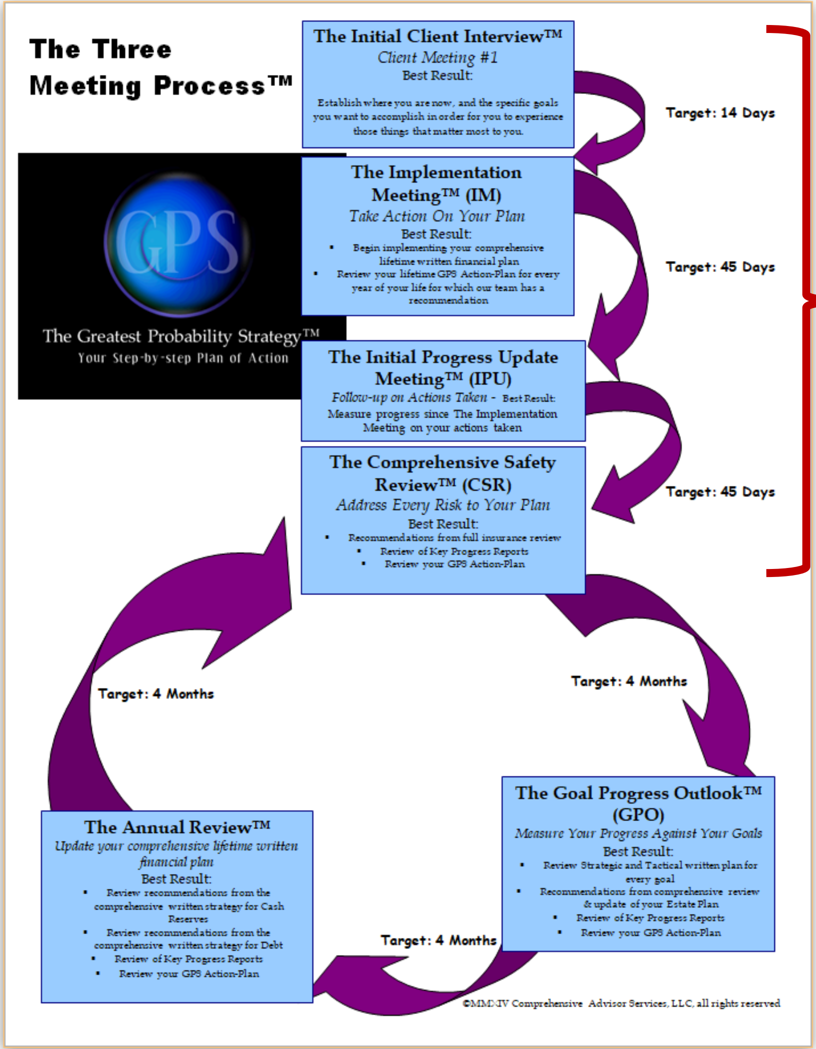
(interacting with more non-clients outside the office every week) **10**

Question

- ✓ You've mentioned that when people ask you what you do, you tell them. But what do you do if they keep asking details about what you do?

What do you do?

Think “next step” not “long-term”
(NOT “Ideal Client”)

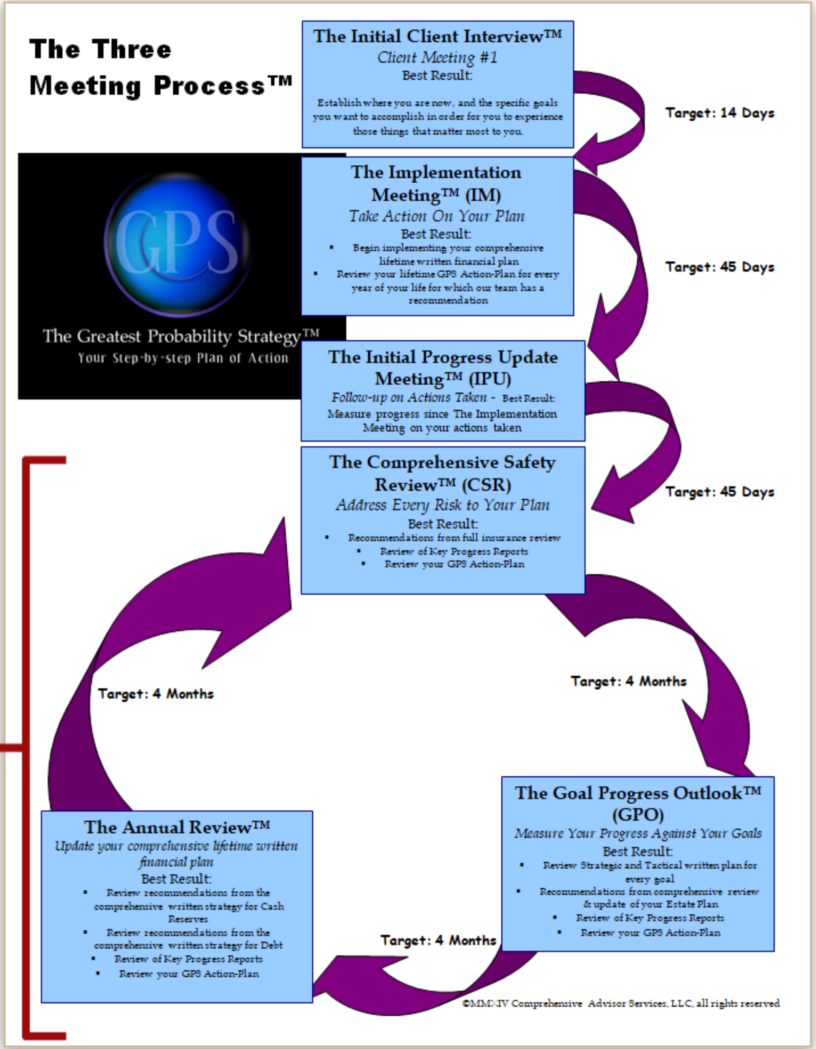


Create a comprehensive written lifetime financial strategy (overarching plan)

Meet 3X per year,
once every 4-months
...FOREVER

Deliver Truly
Comprehensive
Financial Services™

Ensure goals are
on-track & stay on-track



The Three Meeting Process™

The Greatest Probability Strategy™
Your Step-by-step Plan of Action

The Initial Client Interview™
Client Meeting #1
Best Result:

Establish where you are now, and the specific goals you want to accomplish in order for you to experience those things that matter most to you.

Target: 14 Days

The Implementation Meeting™ (IM)
Take Action On Your Plan
Best Result:

- Begin implementing your comprehensive lifetime written financial plan
- Review your lifetime GPS Action-Plan for every year of your life for which our team has a recommendation

Target: 45 Days

The Initial Progress Update Meeting™ (IPU)
Follow-up on Actions Taken - Best Result:
Measure progress since The Implementation Meeting on your actions taken

Target: 45 Days

The Comprehensive Safety Review™ (CSR)
Address Every Risk to Your Plan
Best Result:

- Recommendations from full insurance review
- Review of Key Progress Reports
- Review your GPS Action-Plan

Target: 4 Months

The Goal Progress Outlook™ (GPO)
Measure Your Progress Against Your Goals
Best Result:

- Review Strategic and Tactical written plan for every goal
- Recommendations from comprehensive review & update of your Estate Plan
- Review of Key Progress Reports
- Review your GPS Action-Plan

Target: 4 Months

The Annual Review™
Update your comprehensive lifetime written financial plan
Best Result:

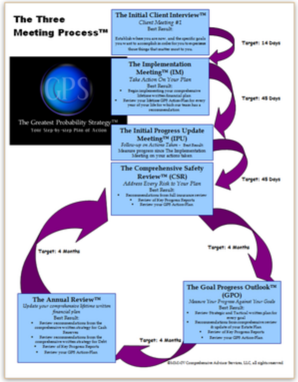
- Review recommendations from the comprehensive written strategy for Cash Reserves
- Review recommendations from the comprehensive written strategy for Debt
- Review of Key Progress Reports
- Review your GPS Action-Plan

Target: 4 Months

The Three Meeting Process™

Further information on The Three Meeting Process™, including the 15 Essential Elements of an Initial Client Interview.

The Three Meeting Process™ is comprised of three one-time meetings, followed by three meetings that each occur annually for the duration of your client's life. Click the graphic below to download an editable document of The Three Meeting Process™.



The 15 Essential Elements of an Effective Initial Client Interview

The Initial Client Interview is the first sit-down meeting you'll have with a potential Ideal Client. If they fit your Ideal Client Profile, this meeting will result in an invitation to join your Ideal Client [illegible]unity.

W[illegible] ss[illegible] me[illegible] at [illegible] ou[illegible] rea[illegible] e[illegible] cti[illegible] c[illegible] nt [illegible] qu[illegible] ti[illegible] pr[illegible] ss. If [illegible] don't, w[illegible] com[illegible] en[illegible] Adv[illegible] Vi[illegible] aining program.

Regardless of your client acquisition methods, there are 15 essential elements to conducting an effective Initial Client Interview. Follow these guidelines to create an e[illegible] client experience for you[illegible] tential client. You sh[illegible] omplish all of these elements in a single 60-minute Initial Client Intervi[illegible]

1. **[illegible]reate a [illegible] ig[illegible] y [illegible] m[illegible] lli[illegible] e[illegible] nce fo[illegible] ou[illegible] ot[illegible] ti[illegible] client.** T[illegible] In[illegible] l C[illegible] nt [illegible] ervie[illegible] shoul[illegible] e a[illegible] sitive and e[illegible] ot[illegible] al ch[illegible] ge [illegible] "wow" experience, in your pote[illegible] ent's opinion.
2. **The meeting must be valuable for both spouses**, regardless of the outcome (whether or not you decide to work with this potential client after this meeting).
3. **T[illegible] m[illegible] et[illegible] g [illegible] us[illegible] be [illegible] o[illegible] y[illegible] r pote[illegible] ia[illegible] ent's t[illegible]** [illegible] "I'[illegible] attendin[illegible] is m[illegible] ting."
4. **If married, both spouses must be present.** The value and outcome of the meeting must be relevant to and worth the time of **both** spouses (even if they generally dislike "financial matters").
5. **Both spouses must feel that their presence is necessary to the outcome of the meeting.** After the meeting, your potential client should be thinking, "I provided information and input which was required to achieve the valued meeting outcome—this wasn't just a lecture. The valuable

Compelling Experience?
Compelling for BOTH spouses?
Valuable even if don't work together?

What's accomplished for them at The Initial Client Interview?

What's in it for them?

What's the beneficial outcome for them?

You’re a stock broker, right?

Actually…

You only want to meet with people if they don’t currently have a Financial Advisor, right?

Actually…

What's the difference between a Financial Advisor & what you do?

What do you charge for a meeting like that?

Question

- ✓ I just had a client leave me for greener pastures (another Financial Advisor), what can I do to retain clients?

Dan Sullivan

The 4 referability habits

1. Show up on time
2. Do what you say you're going to do
3. Finish what you start
4. Say please & thank you

Mark's 3 Retention Standards

- ✓ Be highly responsive to clients
- ✓ Meet deadlines you promise
- ✓ New ideas at every meeting

Mark's 3 Retention Standards

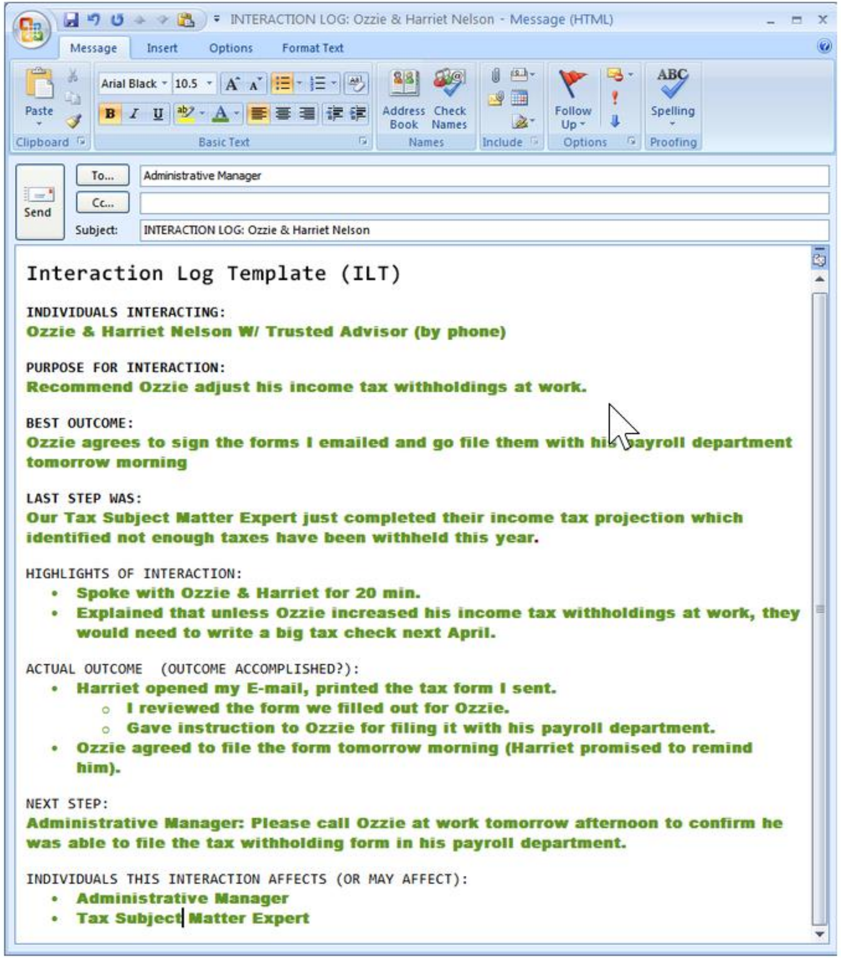
Be highly responsive to clients

2-hours whenever possible

Mark's 3 Retention Standards

Meet deadlines you promise

The Interaction Log™ circulated to your entire team within 48 hours



INTERACTION LOG: Ozzie & Harriet Nelson - Message (HTML)

To... Administrative Manager

Cc...

Subject: INTERACTION LOG: Ozzie & Harriet Nelson

Interaction Log Template (ILT)

INDIVIDUALS INTERACTING:

Ozzie & Harriet Nelson W/ Trusted Advisor (by phone)

PURPOSE FOR INTERACTION:

Recommend Ozzie adjust his income tax withholdings at work.

BEST OUTCOME:

Ozzie agrees to sign the forms I emailed and go file them with his payroll department tomorrow morning

LAST STEP WAS:

Our Tax Subject Matter Expert just completed their income tax projection which identified not enough taxes have been withheld this year.

HIGHLIGHTS OF INTERACTION:

- **Spoke with Ozzie & Harriet for 20 min.**
- **Explained that unless Ozzie increased his income tax withholdings at work, they would need to write a big tax check next April.**

ACTUAL OUTCOME (OUTCOME ACCOMPLISHED?):

- **Harriet opened my E-mail, printed the tax form I sent.**
  - **I reviewed the form we filled out for Ozzie.**
  - **Gave instruction to Ozzie for filing it with his payroll department.**
- **Ozzie agreed to file the form tomorrow morning (Harriet promised to remind him).**

NEXT STEP:

Administrative Manager: Please call Ozzie at work tomorrow afternoon to confirm he was able to file the tax withholding form in his payroll department.

INDIVIDUALS THIS INTERACTION AFFECTS (OR MAY AFFECT):

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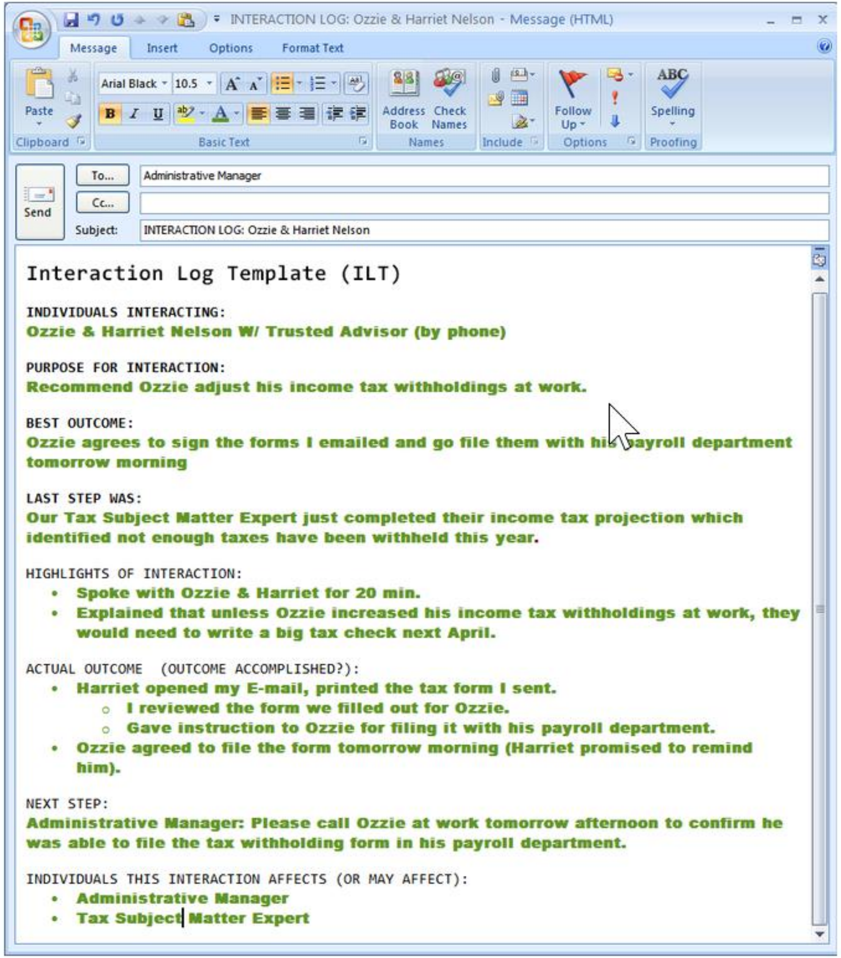
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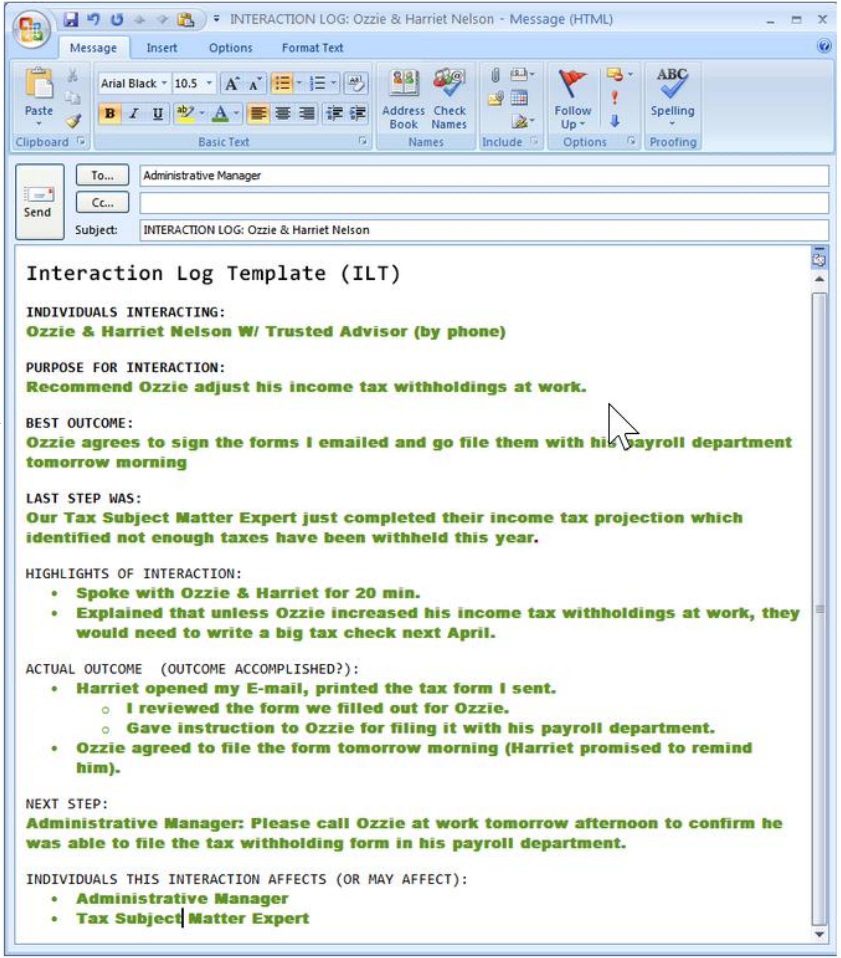

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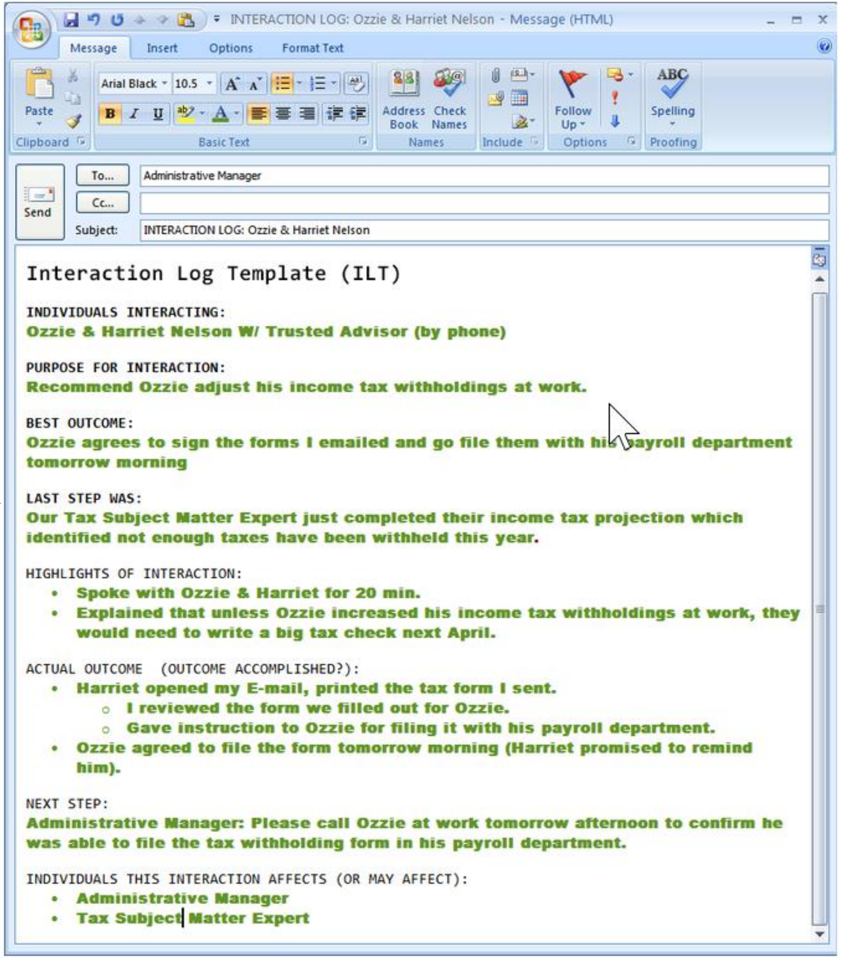

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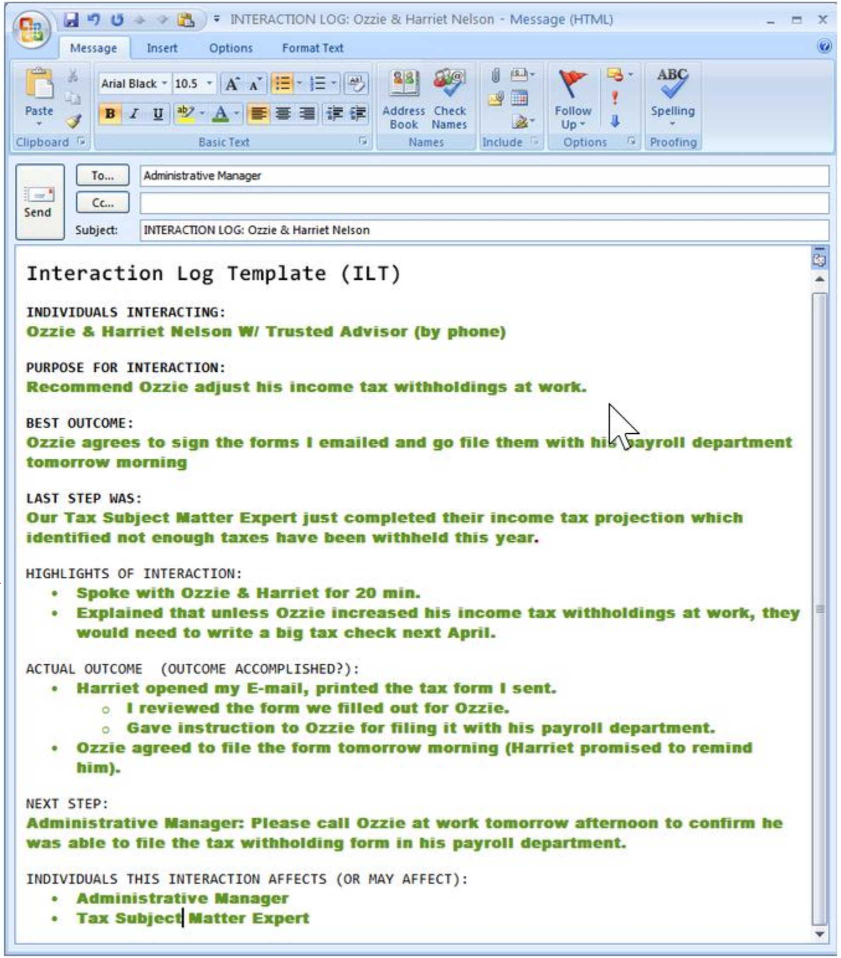

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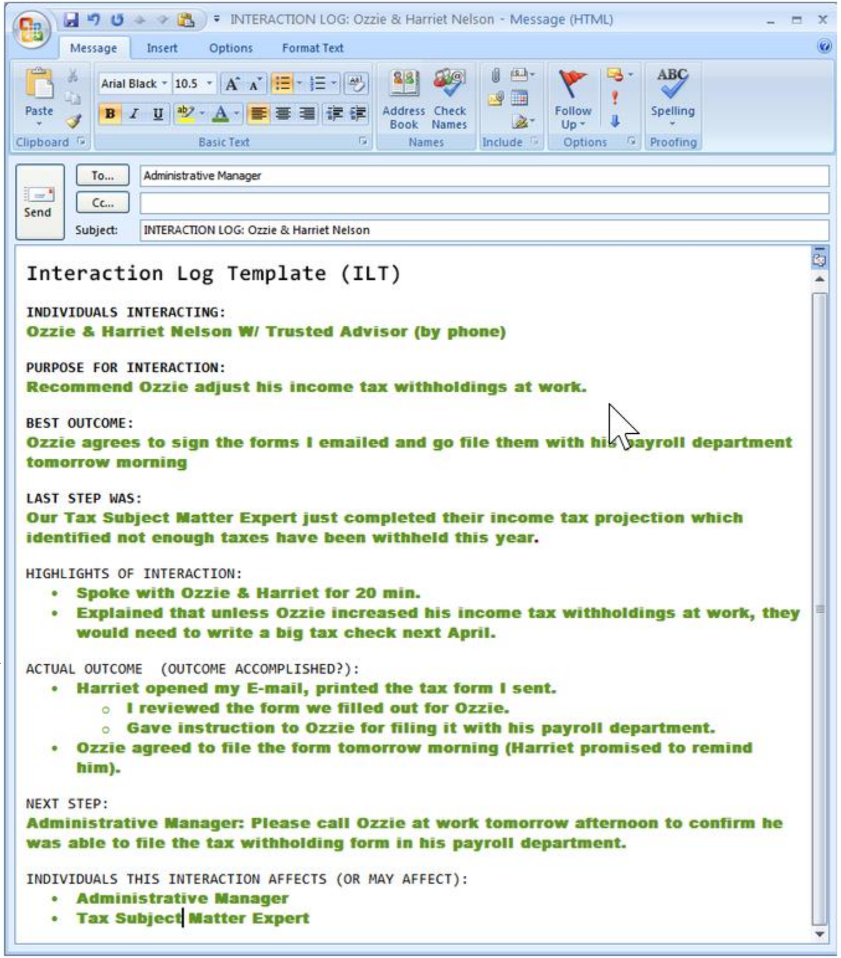

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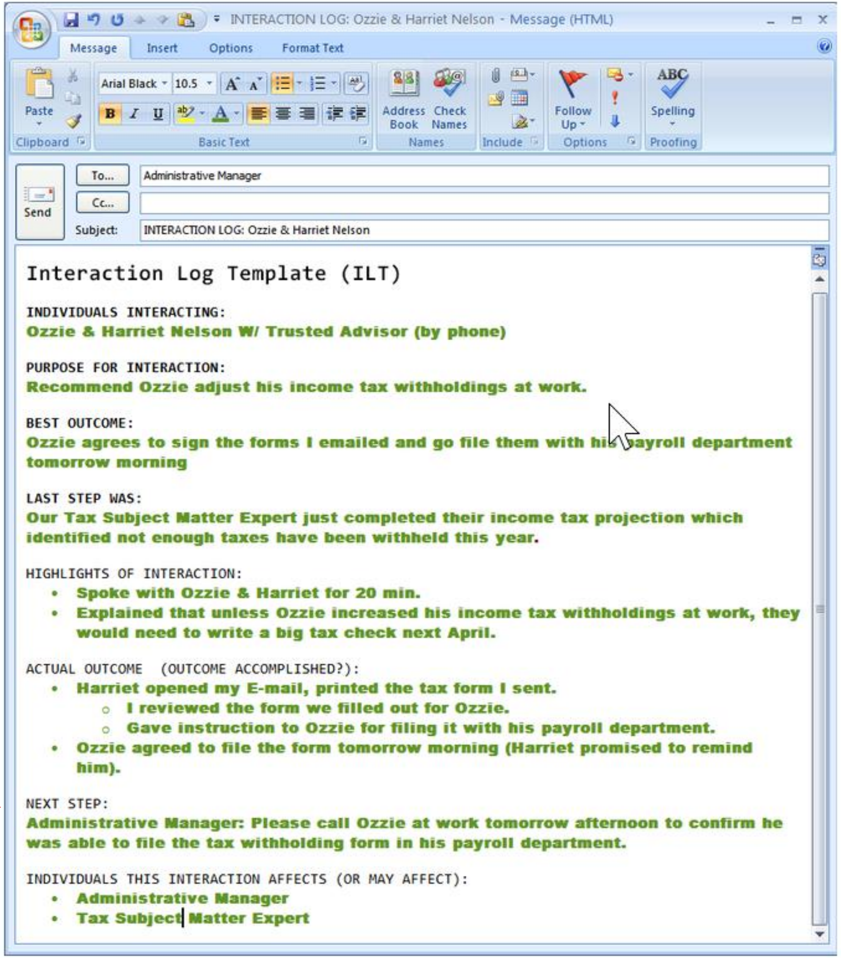
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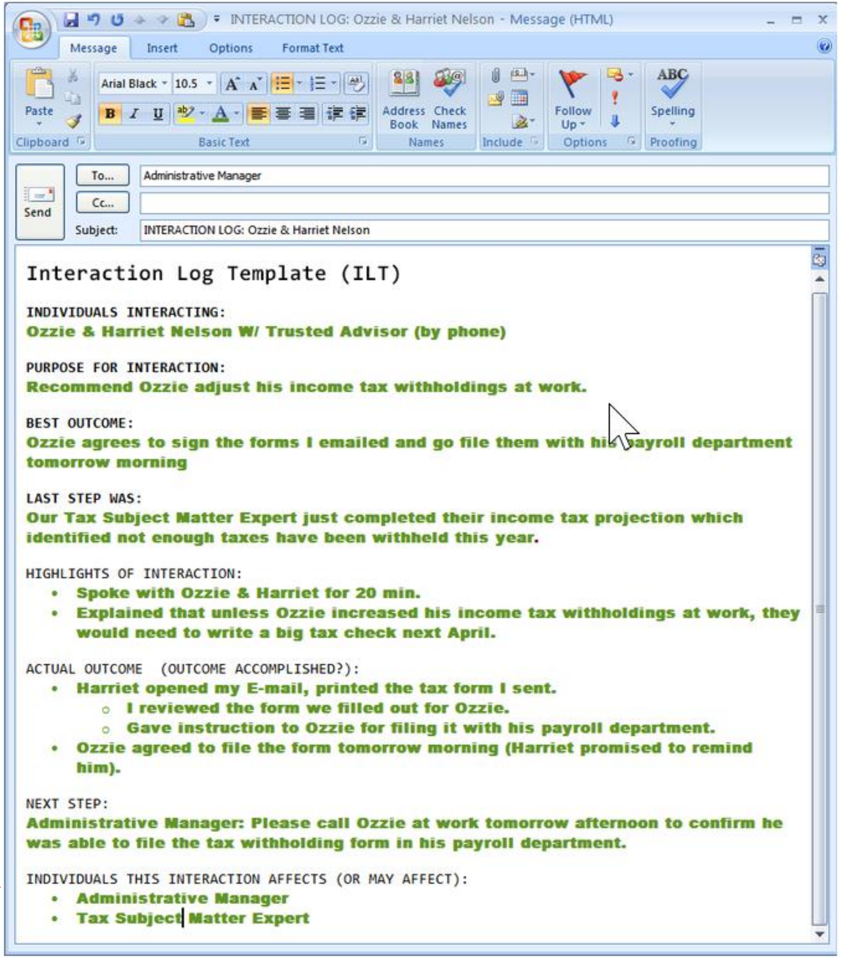

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The Interaction Log™

What do you notice about TIL?
What does TIL look like to you?

It's just NOTES from the interaction
(notes in a required format)

Mark's 3 Retention Standards

Meet deadlines you promise

The Interaction Log™ circulated to your entire team within 48 hours

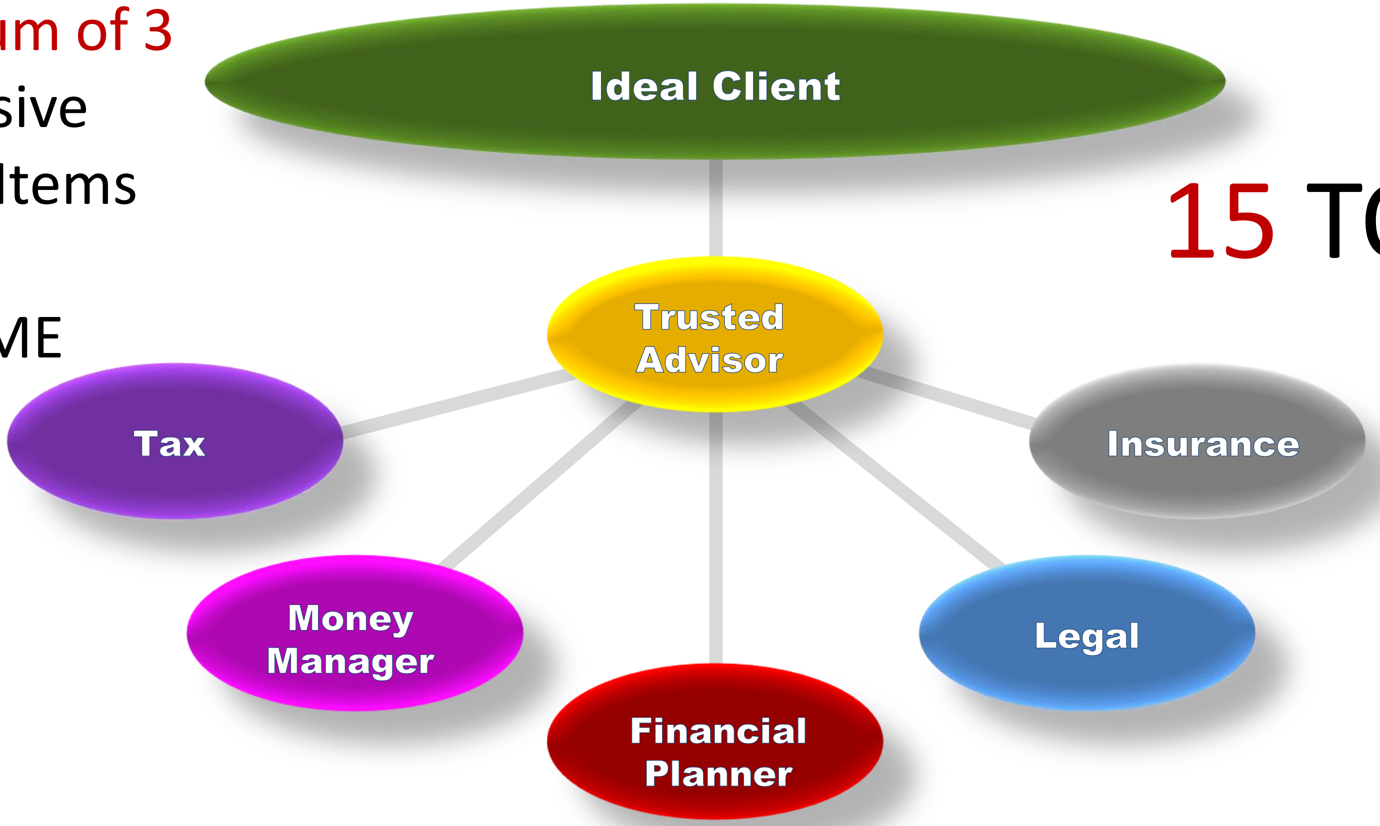
Mark's 3 Retention Standards

New ideas at every meeting…

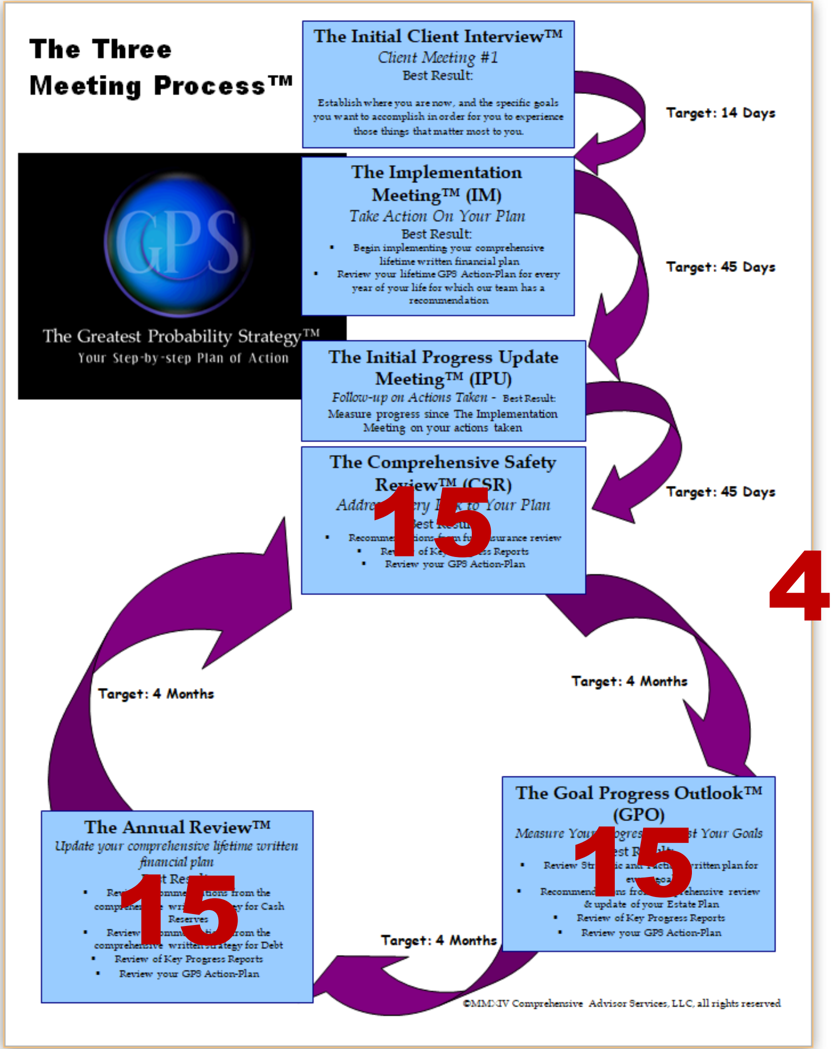
Without fail… require 15 impressive Action Items or recommendations prior to every client progress meeting

Our Deliverables Team Structure

Require a minimum of 3 impressive Action Items from each SME



15 TOTAL



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45 per year

Mark's 3 Retention Standards

- ✓ Be highly responsive to clients
- ✓ Meet deadlines you promise
- ✓ New ideas at every meeting

FAM CERTIFICATION (DRAFT):
Financial Advisor Mastery…

1. ★ Team of 3+ covering **ALL FIVE** areas of Personal Finance
2. ★ **The Ten Client Deliverables** covered by annual list of Deliverables Checkpoints created by your Subject Matter Experts across all 5 areas
3. ★ **CWLFS** updated at least annually for every ideal client
4. ★ **The Three Meeting Process** in place – Next 12-mo meetings are currently scheduled (at all times)
5. ★ **45** impressive, above average, **action items** per ideal client over the past 12 months
6. ★ ★ ★ The MONTHLY Referability Dashboard: **TARR >3** & 1 Ideal Client acquired over the past 2 consecutive quarters

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

File Edit View Insert Format Data Tools Extensions Help Last edit was 3 minutes ago

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] WT)	Key Financial A [illegible] or 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] ar [illegible] ated [illegible] of the [illegible] nal fin [illegible] (each repo [illegible] eate [illegible] the [illegible] le for [illegible] ar
FIRP	[illegible] shi [illegible] The [illegible] ght [illegible] ds	[illegible] "circles" all [illegible] s move [illegible] in: Ou [illegible] nily, [illegible] ds, colle [illegible] s, ch [illegible] n, hobbies, t [illegible] are [illegible] xamp [illegible] f "circ [illegible] or p [illegible] we might operate
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GMME	[illegible] e GM [illegible] urse	The Gr [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 [illegible] of Mastery™ https://
GPO	[illegible] e Goa [illegible] gress C [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 P [illegible] bility 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)

Best Advice

Invest 5min completing your Business Activity Spreadsheet EVERY week

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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/

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