ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Monthly Session

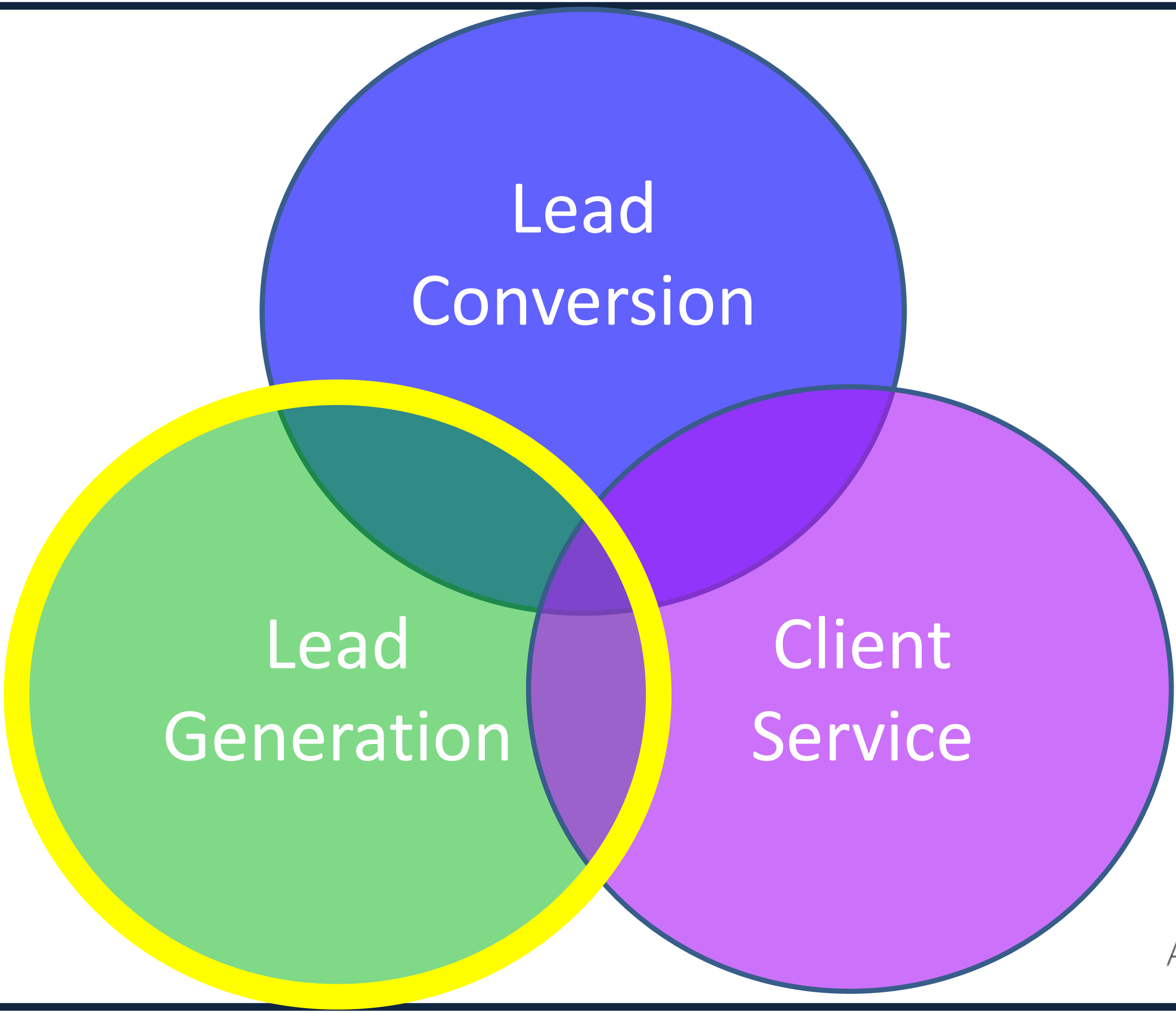
Monthly Advice Session

Nov 21, 2023

With Host Mark McKenna Little

Overview of The Financial Advisor Mastery Program

1. Client Acquisition
2. Client Conversion
3. Client Service



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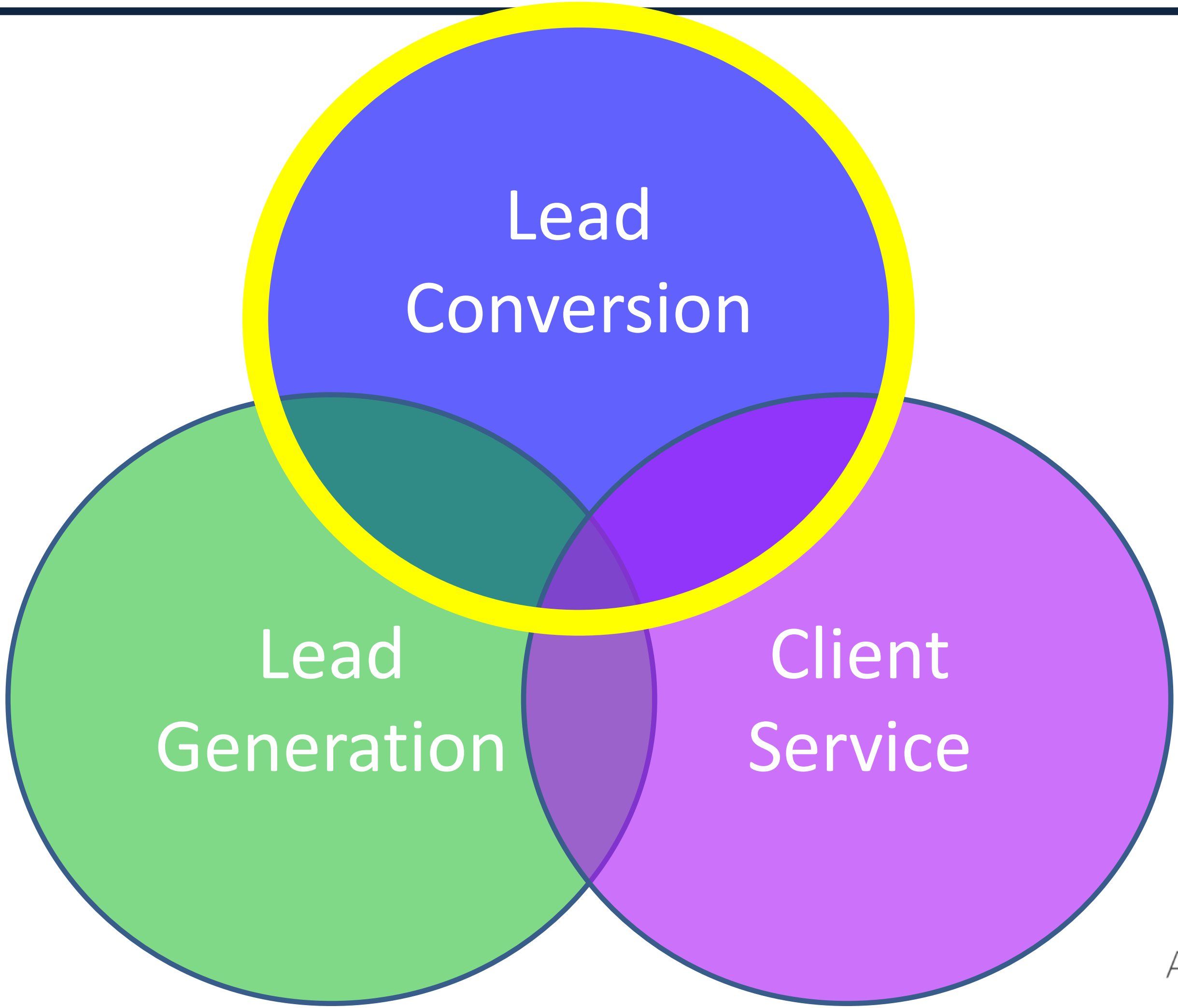

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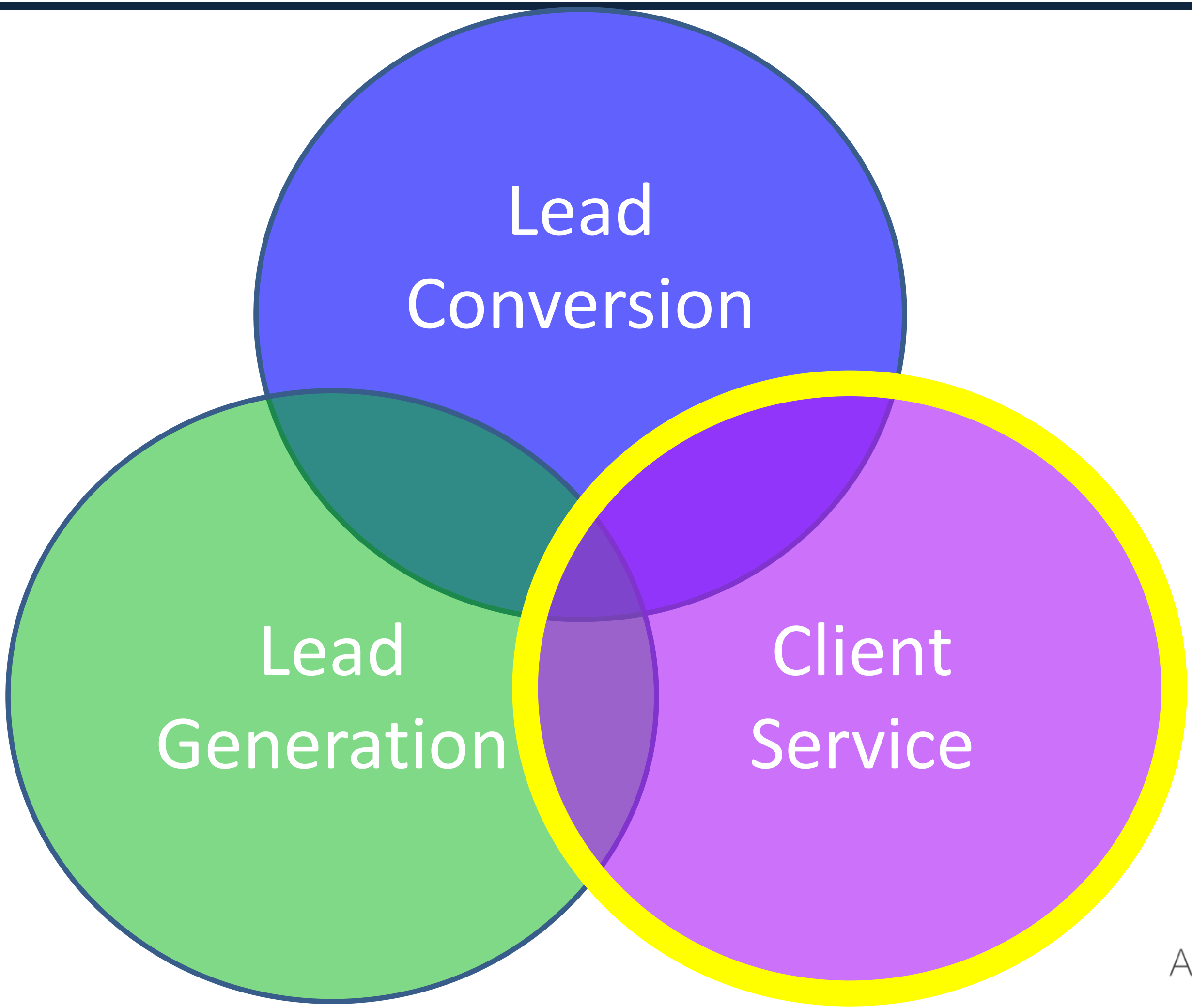

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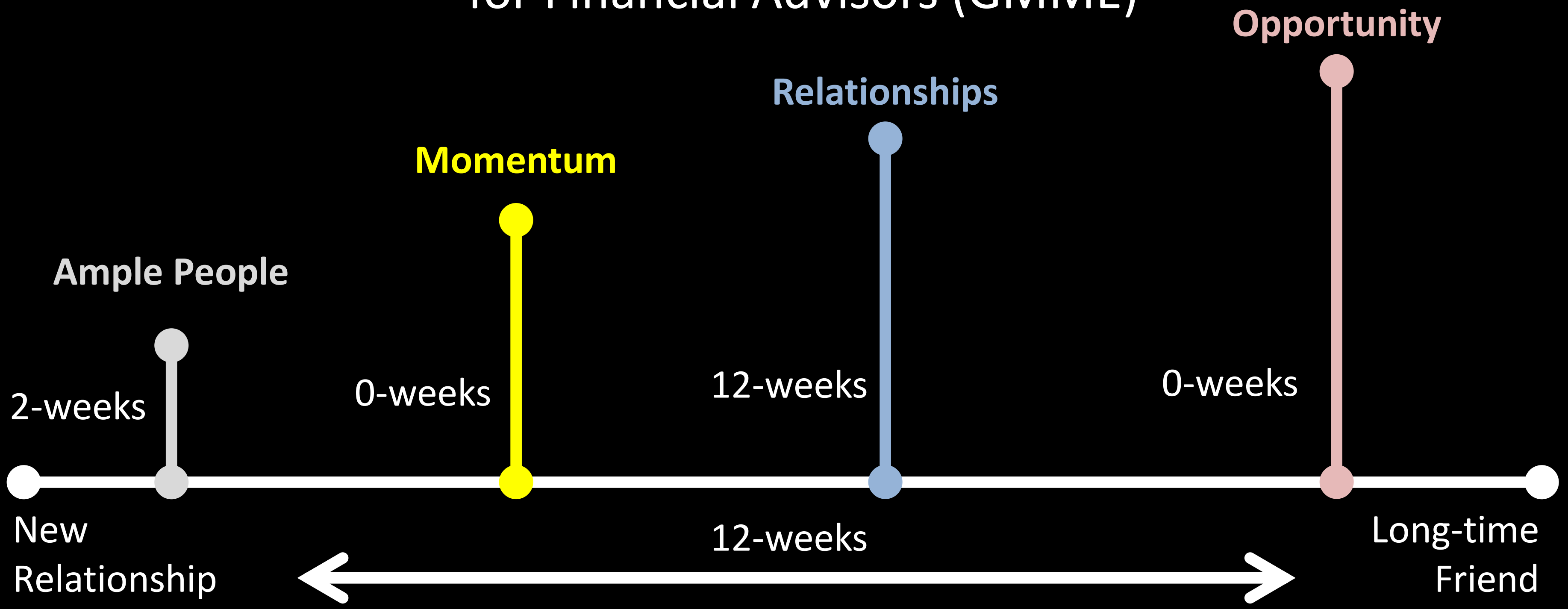
Client Acquisition

GMME

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



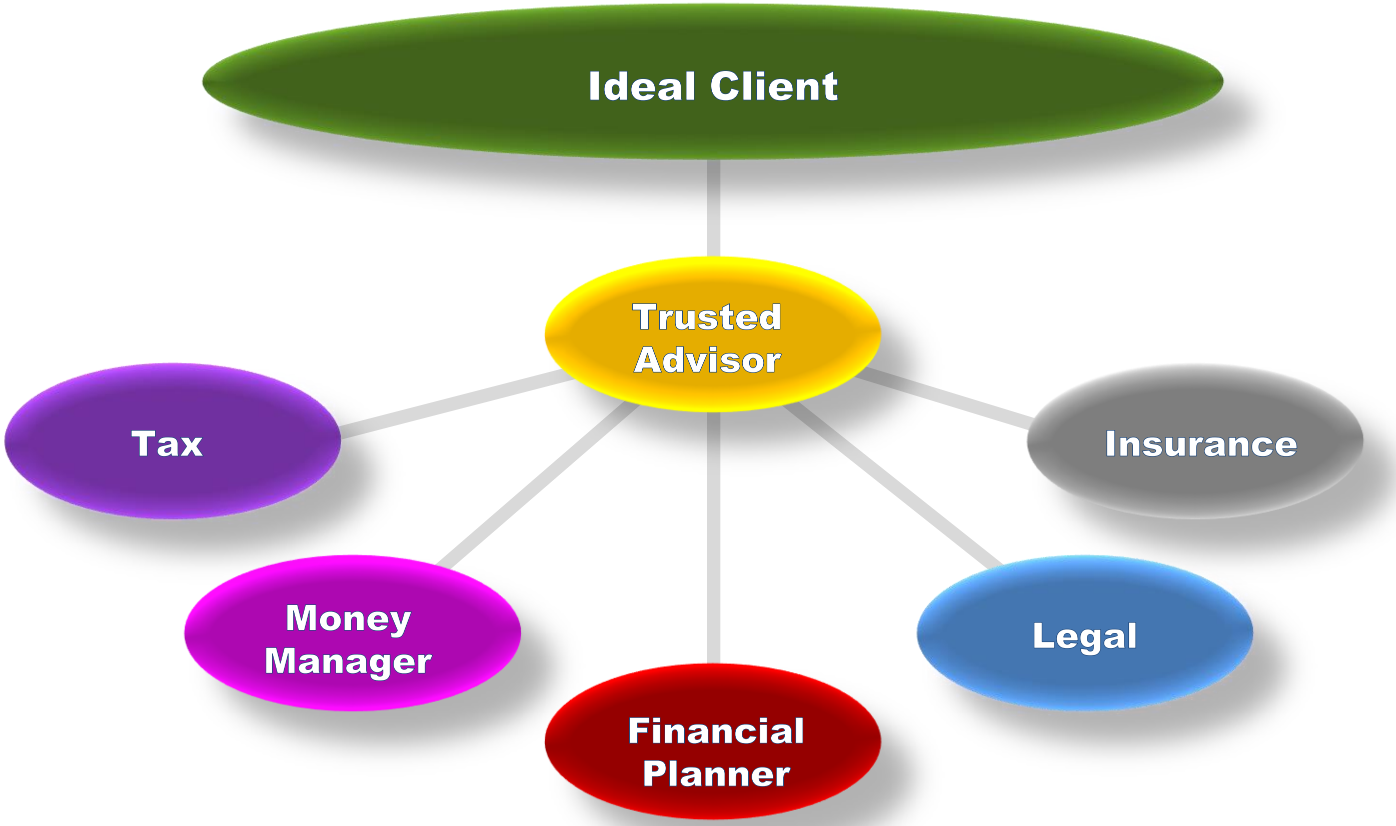
Client Conversion

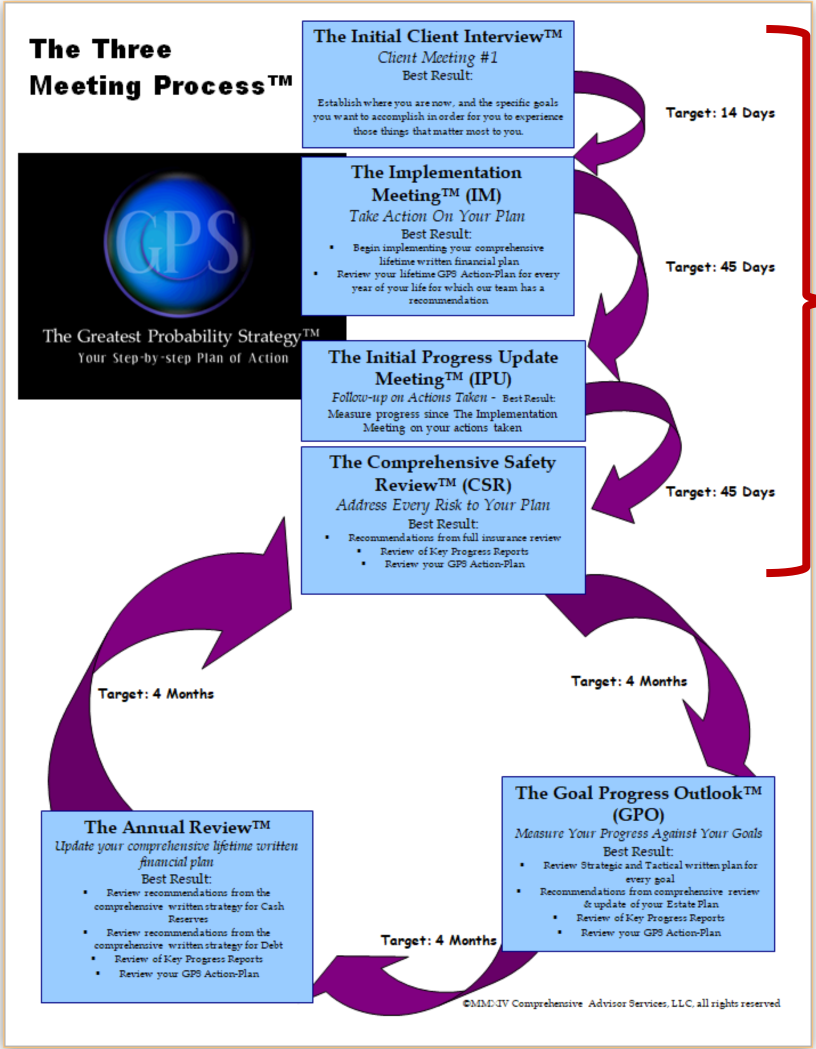
The 8 **essential elements** of an effective Client Conversion Process

Client Service

Delivering
on the promise
of
Truly Comprehensive
Financial Services™

Our Different Deliverables Team Structure



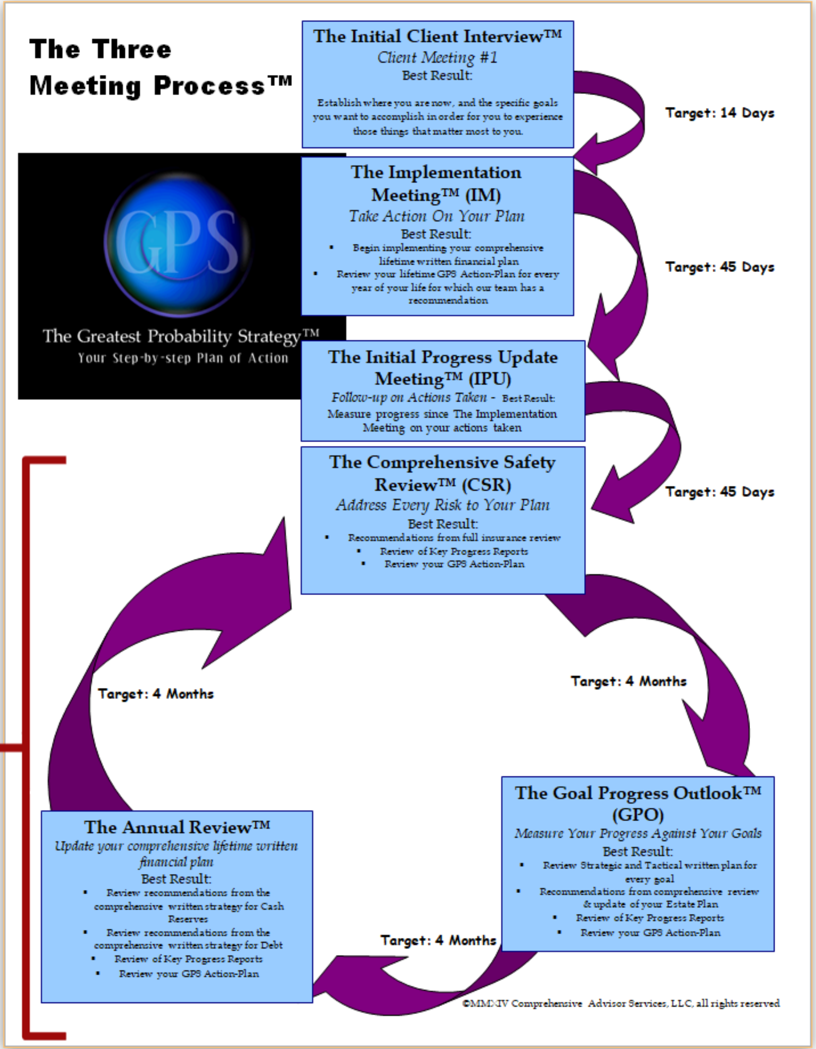


Create a comprehensive written lifetime financial strategy (overarching plan)

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

Deliver Truly
Comprehensive
Financial Services™

Ensure goals are
on-track & stay on-track



The 3 Bottom-line Client Outcomes

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

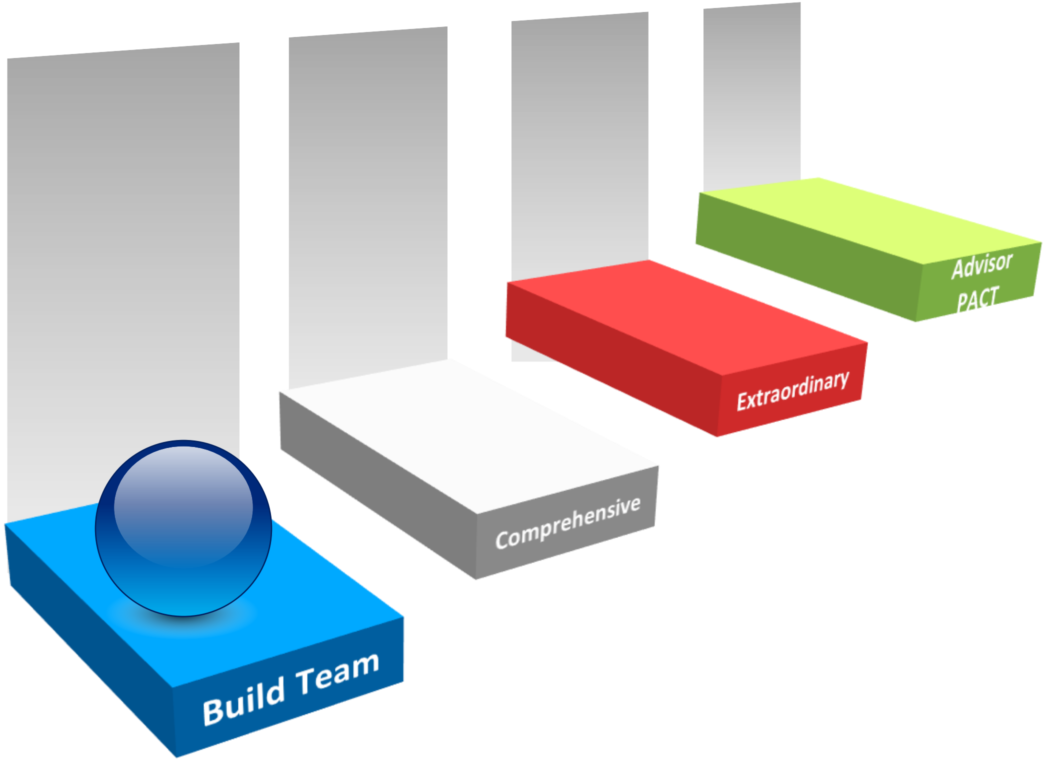
2. **Proactive on all financial issues**

3. **Make better financial decisions**

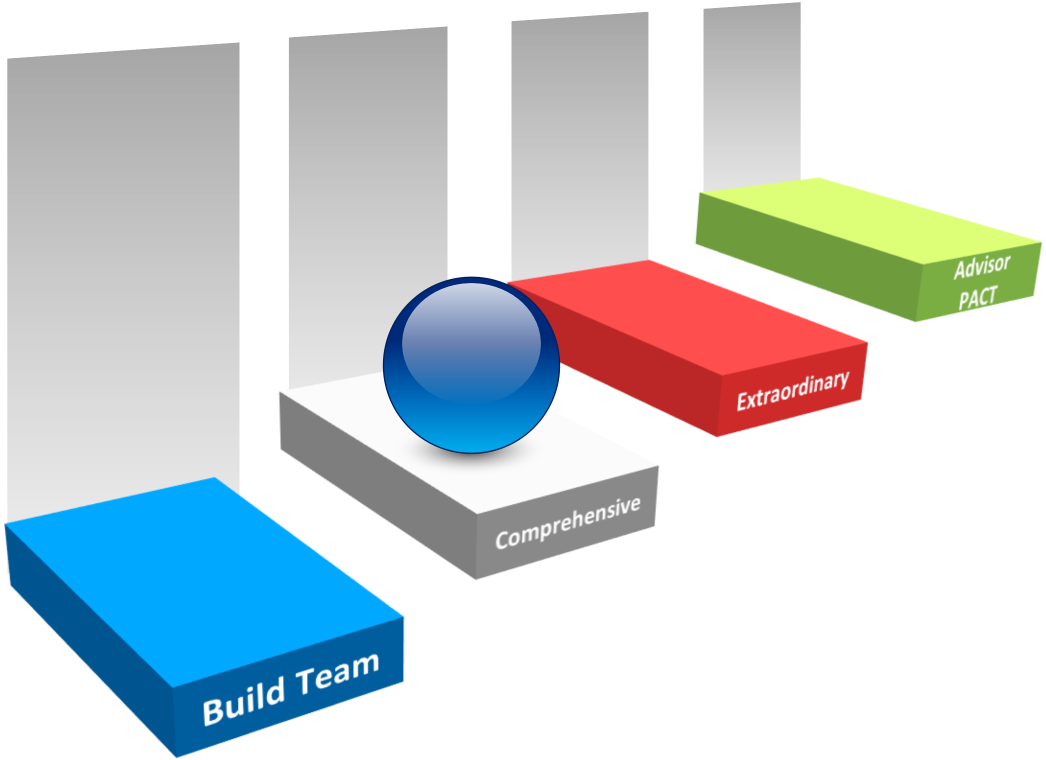
   … in all areas of personal finance

The 4 Steps

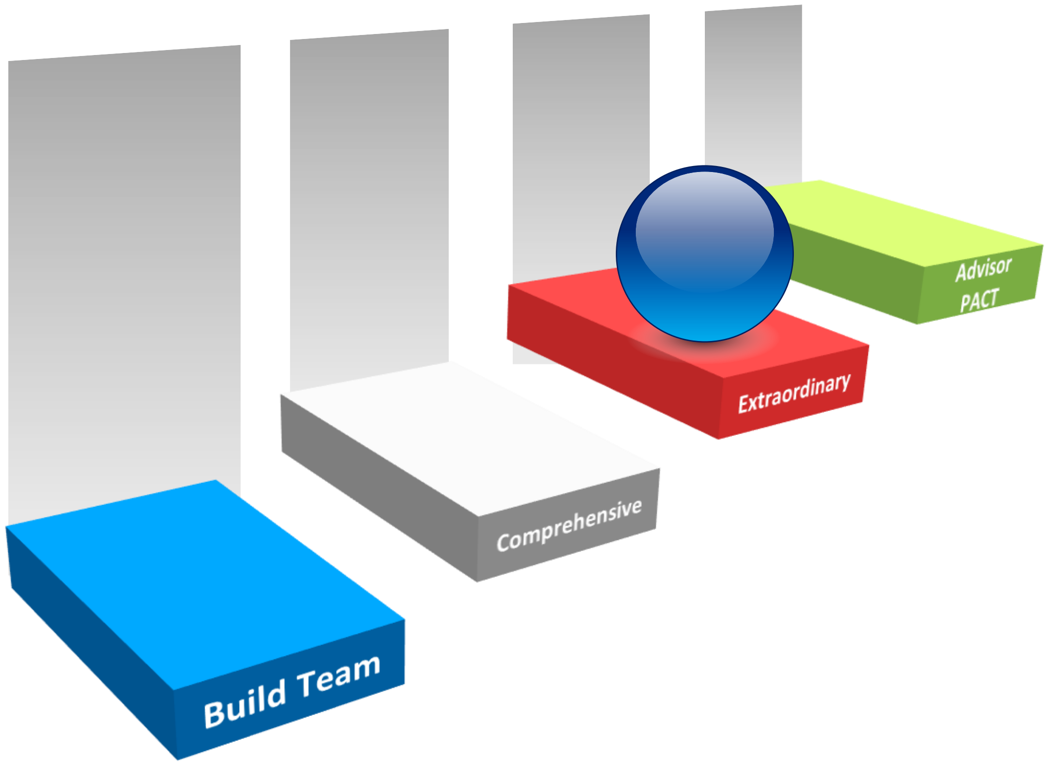
Delivering on The Promise



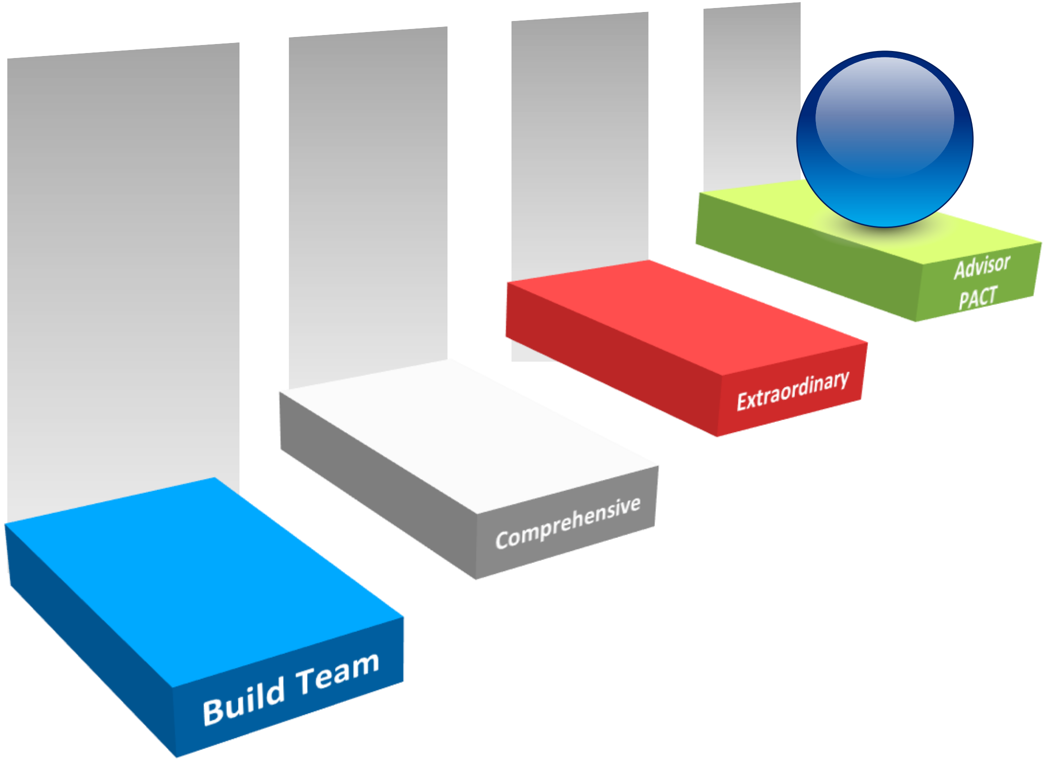
Delivering on The Promise



Delivering on The Promise



Delivering on The Promise



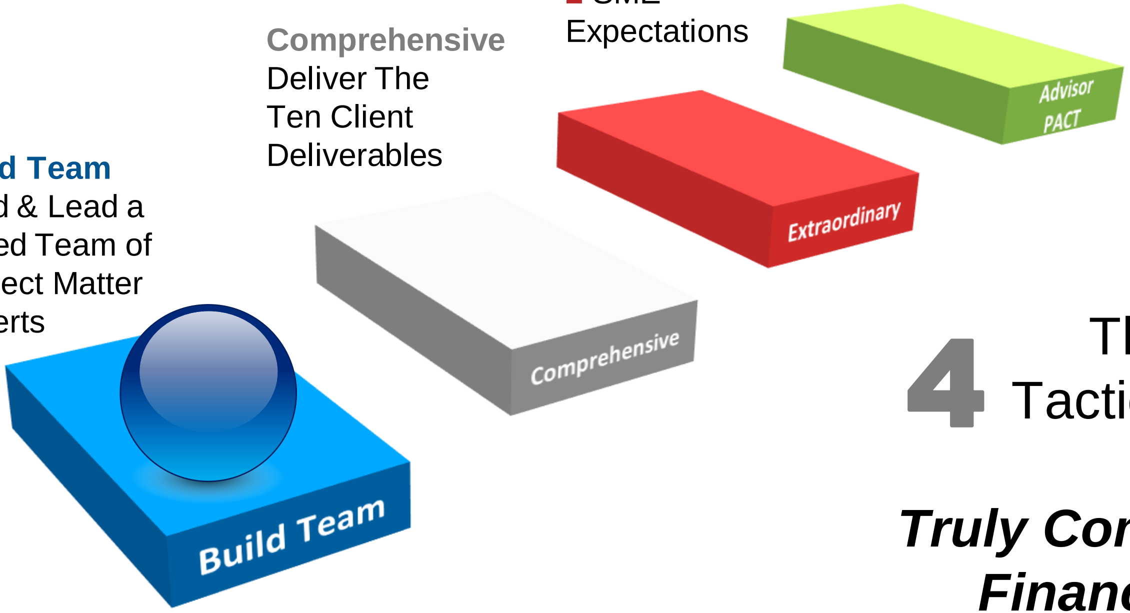
Delivering on The Promise

Build Team
Build & Lead a skilled Team of Subject Matter Experts

Comprehensive
Deliver The Ten Client Deliverables

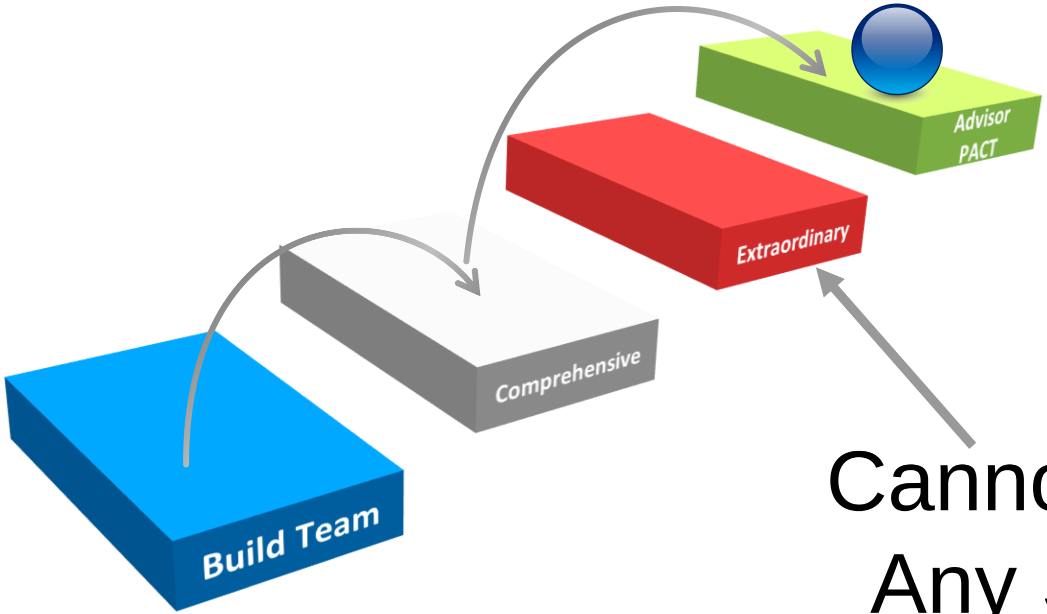
Extraordinary
Deliver on the **2** SME Expectations

Deliver on your **Advisor PACT** Pledge



4 These Are The Tactical Steps For Delivering ***Truly Comprehensive Financial Services***

Delivering on The Promise



Cannot **Skip**
Any Steps

Delivering on The Promise

We're a financial services **monopoly**

We're the only game in town.

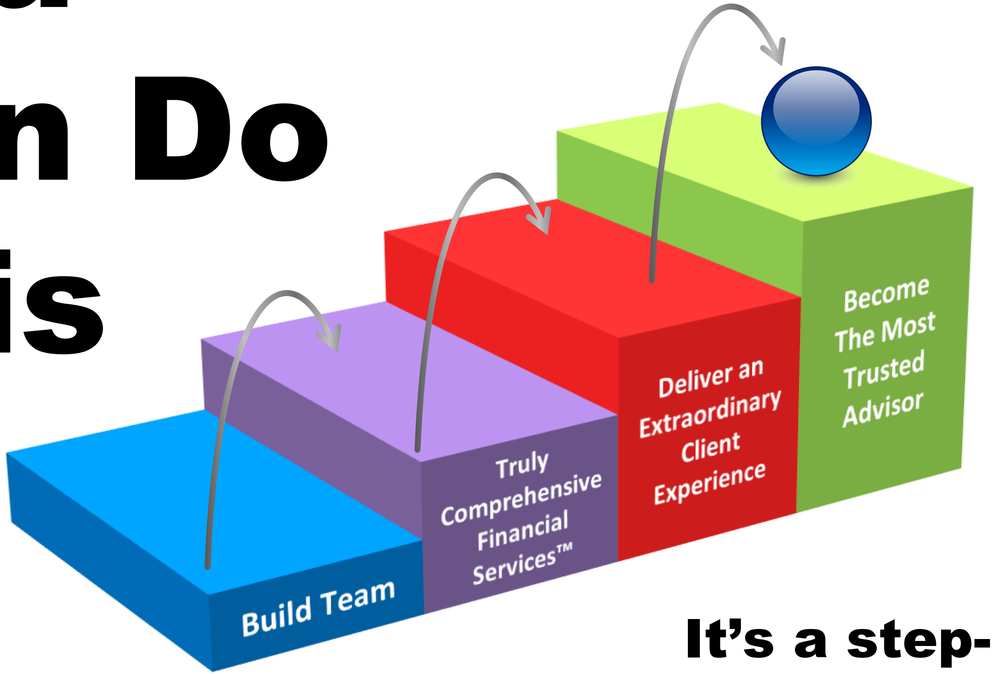
For what we do, potential clients have no other option than utilizing us

Delivering on The Promise

ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

You Can Do This



It's a step-by-step process

The APM Program

Assess your progress

1. Do you have all 5 SME areas covered by a team?
2. Have you required each of your SMEs to create an annual checklist? (Your annual Deliverables Checkpoints created?)
3. Are you charging a minimum $10,000 client fee to create an overarching strategy?
4. Is The Three Meeting Process booked 12-months out right now?
5. Has every SME provided a minimum of 10 impressive Action Items for each Ideal Client over the past 12-months?
6. How many Ideal Clients have you acquired over the past 12-months?

Unsolicited client referrals

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]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	[illegible]"circles" all[illegible]s move[illegible]in: Ou[illegible]ily,[illegible]ds, collea[illegible]s, ch[illegible]n, hobbies, t[illegible]are[illegible]examp[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]inanc[illegible]xper[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 C[illegible]ok™	[illegible]meet[illegible]The T[illegible]g Pro[illegible]s™
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 with the 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 Idea
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

ADVISOR PACT

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/

ADVISOR PACT™

The Only Game in Town

Protection
Attention
Coordination
Transparency