The Advisor PACT Monthly Session™

February 17, 2015
Hosted by Mark Little

Issues Covered in this Session

- ✓ I’m new to The Advisor P.A.C.T. Monthly Program™, what are the first few things I should do?
- ✓ I just hired a new Administrative Manager. How would you suggest I describe to a new employee what our mission is? How should I describe what we do? How should I describe the role of an Administrative Manager?
- ✓ I used to work at a Wire-House firm and, as financial advisors, we were required to track our daily activities. What internal activities do you recommend we track?

Question

I'm new to The Advisor P.A.C.T. Monthly Program™, what are the first few things I should do?

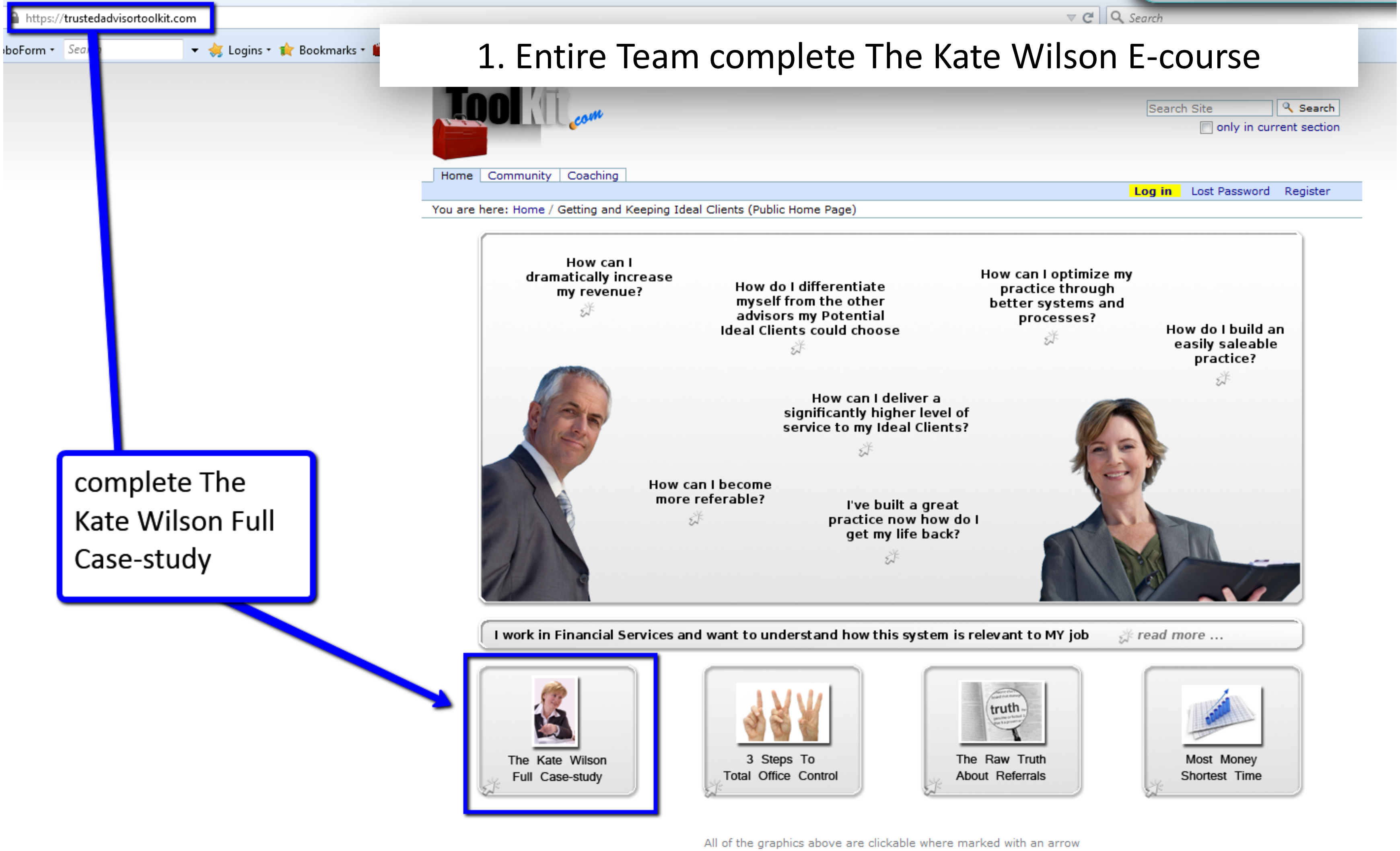
1. Everyone currently working with you, including Subject Matter Experts with whom you are aligned, complete The Kate Wilson Full Case-study found at https://TrustedAdvisorToolkit.com

2. Establish your compensation for Truly Comprehensive Financial Services™

3. Finalize your Ideal Client Profile

1. Entire Team complete The Kate Wilson E-course

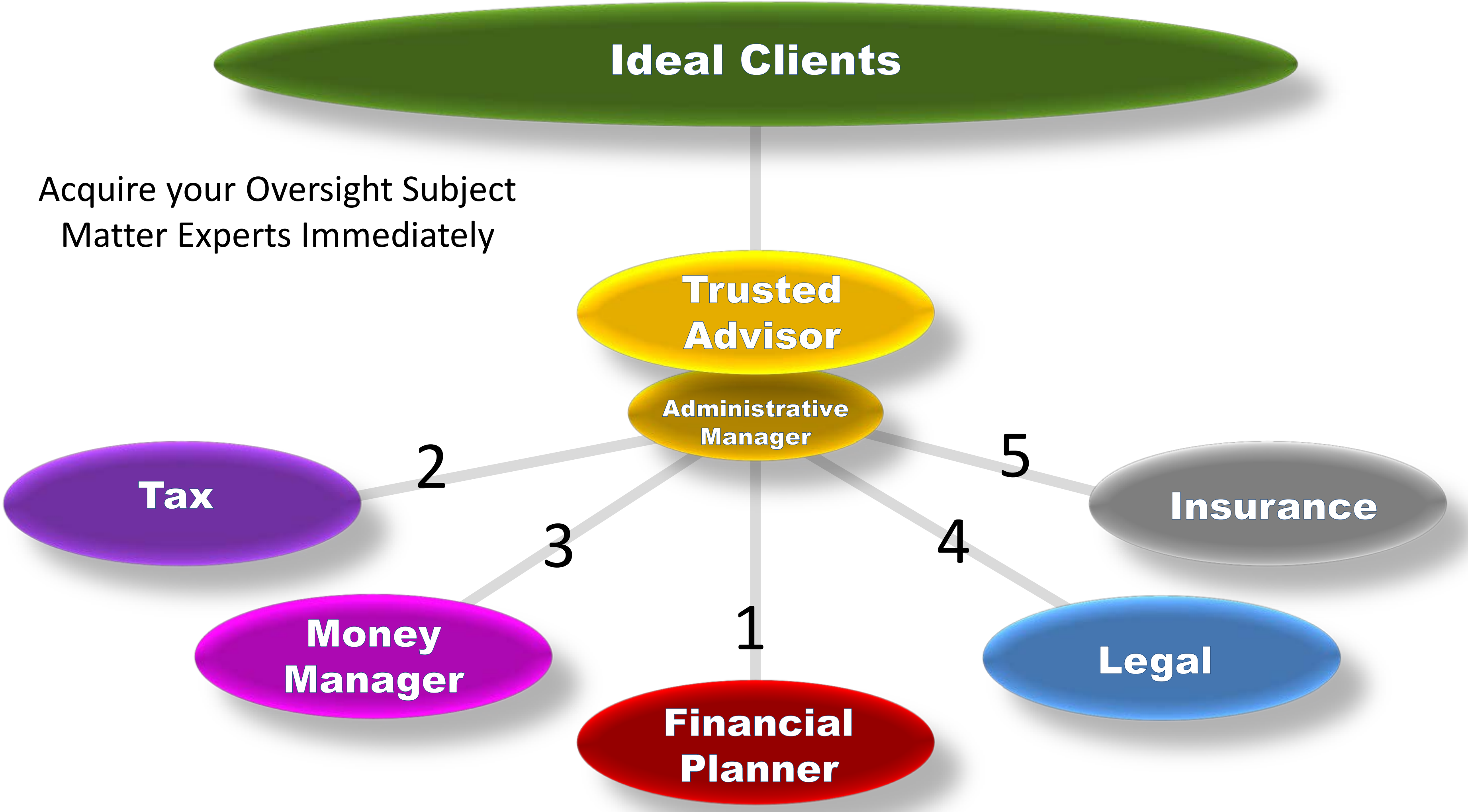
complete The Kate Wilson Full Case-study



2. Establish your compensation for Truly Comprehensive Financial Services™

- ✓ Invite 5 Subject Matter Experts onto your team

Acquire your Oversight Subject Matter Experts Immediately



2. Establish your compensation for Truly Comprehensive Financial Services™

- ✓ Invite 5 Subject Matter Experts onto your team
- ✓ As a team, establish your "Client Deliverables" and Deliverables Checkpoints™ (the checklist of items which will define the services you will offer Ideal Clients across all 5 areas of personal finance)
- ✓ Then, as Trusted Advisor, establish your compensation (annual fee)

IMPORTANT NOTES:

1. Your compensation is a matter of confidence for you. High confidence = higher compensation.
2. Most advisors set their compensation too low
3. More than half of the advisors on The Trusted Advisor Toolkit™ charge more than $20,000 per year for Comprehensive Financial Services (a handful set compensation between $40,000 - $50,000 per year

3. Finalize your Ideal Client Profile

- ✓ Establish the profile of the client you serve best
- ✓ Only invite individuals and families into your Ideal Client Community if they meet this profile
- ✓ Explain to your team, "***Our new goal is to create a community of Ideal Clients, all other clients are Non-ideal Clients. Our ultimate goal is to work only with Ideal Clients.***"
- ✓ Consider accepting only Ideal Clients, from this day forward
- ✓ If you'll offer just one or two, starkly contrasted offers, you'll grow your business more quickly (a menu of services encourages Potential Clients to "think about it"

Our 2, Starkly Contrasted, Offers

Option A

- ✓ If we invite you into our Ideal Client Community
- ✓ My team and I will coordinate all your personal financial affairs, so you don’t have to.
- ✓ Provide Oversight so that you receive Truly Comprehensive Financial Services™
- ✓ Advisor PACT™
- ✓ $35,000 per year

Option B

- ✓ Our team invests 120-days to establish your comprehensive written lifetime financial strategy.
- ✓ We provide you with a step-by-step implementation plan-of-action.
- ✓ We give it to you to implement
- ✓ $10,000 one-time fee

Including a "financial component" which ties to your compensation

Our Ideal Client

The Client we serve the best has the following qualities:

- **THEY ARE FINANCIAL DELEGATORS:** Our community of clients appreciate, and are happy to follow, the advice of a team of financial experts coordinated by a single Trusted Advisor.

- **THEY ARE PASSIONATE ABOUT GOALS:** Our clients realize that achieving their goals requires both money and planning. Our community of Ideal Clients appreciates our commitment to pay close attention to all the financial details and proactively recommend the inevitable course corrections, as required, several times each year.

- **THEY ENJOY SIMPLICITY:** Our clients enjoy the simplicity, freedom, and peace of mind that comes from having all of their financial assets under the watchful eye of a single, Trusted Advisor who provides oversight, coordinating all personal financial affairs.

- **THEY VALUE OUR WORK TOGETHER:** Our clients appreciate advice and guidance. Due to the high level of client interaction and attention, our services make sense for families who have accumulated more $5,000,000, not including the value of their home

- **THEY FOCUS ON WHAT'S IMPORTANT:** Our clients delegate financial matters so they can focus their valuable time and energy on the things in their life that are most important to them. Clients who appreciate an advisor who views their role as to protect financial assets, and the financial strategy, allowing clients to focus upon the things which matter most in life.

- **THEY APPRECIATE THE CANDID TRUTH:** Our clients want to hear the truth from us regarding their financial situation…no matter what. Clients who rely upon complete transparency from their advisor.

Once we have a community of one hundred clients who meet this profile we will not be accepting any new clients.

Question

I just hired a new Administrative Manager.

How would you suggest I describe to a new employee what our mission is?

How should I describe what we do?

How should I describe the role of an Administrative Manager?

Mission

To create an extraordinary client experience while getting our Ideal Client's "financial house" in perfect order

…and keeping it that way forever

Truly Comprehensive Financial Services™

- ✓ Specific written deliverables in-place to ensure everything that should be happening, is actually happening in 5 areas of personal finance,
    1. Financial Planning
    2. Tax Planning
    3. Estate Planning
    4. Money Management
    5. Insurance Planning (Risk Planning)

What’s Different

1. An overarching strategy in place
2. We have a team of Subject Matter Experts
3. Our team collaborates over your financial issues
4. Our team reviews each other’s work
5. Our team provides oversight, to ensure all recommendations are in-alignment with your overarching strategy

Team Commitment

ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

Administrative Manager Role

Project Leader

1. Serves as point-of-contact (clients and team)
2. Responsible for implementation of Truly Comprehensive Financial Services™ (forward movement every week)
3. Coordinate the team of Subject Matter Experts
4. Coordinate all client progress meetings
5. Communication Hub: all information and documents flows through Administrative Manager first (promptly makes all information available to your team)

Priorities

Trusted Advisor

- ✓ Face-to-face or on-the-phone with Ideal Clients (Deliver extraordinary client experience)
- ✓ Face-to-face or on-the-phone with Potential Clients

Subject Matter Experts

- ✓ Responsible for delivering Truly Comprehensive Financial Services™
- ✓ Collaborate with the other Subject Matter Experts
- ✓ Review each other's work prior to meetings

Administrative Manager

- ✓ Protect Trusted Advisor's time
- ✓ Coordinate Subject Matter Experts
- ✓ Ensure everything gets done prior to client progress meetings

Key Performance Measures

Administrative Manager responsible for ensuring the Trusted Advisor meets with all “direct reports” at least once every 4-months to review their Key Performance Measures

Administrative Manager's Name__________________ Completed by____________________ Date_________

Quantity of Work

-10	-9	-8	-7	-6	-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5	+6	+7	+8	+9	+10
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-10:	-5:	0:	+5	+10
• Amount of work completed is **always below** expectations. • Quanty of work completed is **never** impressive.	• Amount of work completed is **usually below** expectations. • Quanty of work completed is **usually** unimpressive.	• Amount of work completed is **sometimes above** expectations. • Quanty of work completed is **sometimes** impressive.	• Amount of work completed is **usually above** expectations. • Quanty of work completed is **usually** impressive.	• Amount of work completed is **always** above expectations. • Quanty of work completed is **always** impressive.

Quality of Work

-10	-9	-8	-7	-6	-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5	+6	+7	+8	+9	+10
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

-10:	-5:	0:	+5	+10
• Amount of work completed is **always below** expectations. • Quanty of work completed is **never** impressive. • **Almost always** makes careless errors • Work is **always** below standard • Online Meeting plans **never** utilized and up-to-date (will need reassignment to another role as soon as practical	• Amount of work completed is **usually below** expectations. • Quanty of work completed is **usually** unimpressive. • **Often** makes careless errors • Work is **usually** below standard • Online Meeting plans **seldom** utilized and up-to-date (may need reassignment to another role)	• Amount of work completed is **sometimes above** expectations. • Quanty of work completed is **sometimes** impressive. • **Sometimes** makes careless errors • Work is **sometimes** above standard • Online Meeting plans **sometimes** utilized and up-to-date (needs improvement to meet this standard of our business)	• Amount of work completed is **usually above** expectations. • Quanty of work completed is **usually** impressive. • **Seldom** makes careless errors • Work is **usually** above standard • Online Meeting plans **usually** utilized and up-to-date (needs improvement to meet this standard of our business).	• Quality of work completed is **always** above expectations. • Quality of work completed is **always** impressive. • **Never** makes careless errors • Work is **always** above standard • Online Meeting plans **always** utilized and up-to-date.

Timliness of Work

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• **Never** shows up on-time • **Never** meets, or beats, deadlines • **Never** ahead of the work-flow schedule for client progress meetings. • **Always** "waits to the last minute" • **Always** allows a Subject Matter Expert to "wait to the last minute"	• **Seldom** shows up on-time • **Seldom** meets, or beats, deadlines • **Seldom** ahead of the work-flow schedule for client progress meetings. • **Often** "waits to the last minute" • **Often** allows a Subject Matter Expert to "wait to the last minute"	• **Sometimes** shows up on-time • **Sometimes** meets, or beats, deadlines • **Sometimes** ahead of the work-flow schedule for client progress meetings. • **Sometimes** "waits to the last minute" • **Sometimes** allows a Subject Matter Expert to "wait to the last minute"	• **Usually** shows up on-time • **Usually** meets, or beats, deadlines • **Usually** ahead of the work-flow schedule for client progress meetings. • **Seldom** "waits to the last minute" • **Seldom** allows any Subject Matter Expert to "wait to the last minute"	• **Always** shows up on-time • **Always** meets, or beats, deadlines • **Always** ahead of the work-flow schedule for client progress meetings. • **Never** "waits to the last minute" • **Never** allows any Subject Matter Expert to "wait to the last minute"

Knows our Ideal Clients Well

-10	-9	-8	-7	-6	-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5	+6	+7	+8	+9	+10
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

-10:	-5:	0:	+5	+10
• **Never** aware of client concerns, mindset, viewpoints and frame of reference. • **Never** correctly grasps a client's motives & motivations • **Never** able to view issues from the client's perspective • **Never** seeks to add to our MISC Organizer for any Ideal Client	• **Seldom** aware of client concerns, mindset, viewpoints and frame of reference. • **Seldom** correctly grasps a client's motives & motivations • **Seldom** able to view issues from the client's perspective • **Seldom** seeks to add to our MISC Organizer for any Ideal Client	• **Sometimes** aware of client concerns, mindset, viewpoints and frame of reference. • **Occasionally** correctly grasps a client's motives & motivations • **Sometimes** able to view issues from the client's perspective • **Sometimes** seeks to add to our MISC Organizer for an Ideal Client	• **Usually** aware of client concerns, mindset, viewpoints and frame of reference. • **Almost always** correctly grasps a client's motives & motivations • **Usually** able to view issues from the client's perspective • **Usually** seeking to add to our MISC Organizer for every Ideal Client	• **Always** aware of client concerns, mindset, viewpoints and frame of reference. • **Always** correctly grasps a client's motives & motivations • **Always** able to view issues from the client's perspective • **Always** seeking to add to our MISC Organizer for every Ideal Client

DRPM Preparedness

-10	-9	-8	-7	-6	-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5	+6	+7	+8	+9	+10
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-10:	-5:	0:	+5	+10
• Your preparedness is **never** apparent to those present. • ***Never*** comes to meetings prepared • ***Never*** contributes pro-active strategies or recommendations for clients. • ***Never*** resourceful or proactive when there are gaps in information or documents needed. • ***Never*** has anything substantive to contribute • Ordinarily seems lost or quiet or indecisive or simply repeats what others have already said	• Your preparedness is **seldom** apparent to those present. • **Seldom** comes to meetings fully prepared (action items completed, reports created, analysis thorough & well-conceived) • **Seldom** contributes pro-active strategies and recommendations for clients. • **Seldom** resourceful or proactive when there are gaps in information or documents needed. • **Sometimes** has substantive comments to contribute • At times seems lost or quiet or indecisive or simply repeats what others have already said	• Your preparedness is **sometimes** apparent to those present. • **Sometimes** comes to meetings fully prepared (action items completed, reports created, analysis thorough & well-conceived) • **Sometimes** contributes pro-active strategies and recommendations for clients. • **Sometimes** resourceful and proactive in spite of gaps in information or documents needed. • **Sometimes** has substantive comments to contribute	• Your preparedness is **usually** obvious to everyone present. • **Usually** comes to meetings ***fully*** prepared (action items completed, reports created, analysis thorough & well-conceived) • **Usually** contributes pro-active strategies and recommendations for clients. • **Usually** resourceful and proactive in spite of gaps in information or documents needed. • **Seldom** unclear about the "client issue at-hand" • **Usually** has substantive comments to contribute	• **Always** arranges that someone other than the Trusted Advisor, facilitates The Dry-Run Prep Meeting™ • A 60-day notification is always sent to all Subject Matter Experts assigned more than 60-days prior to every client progress meeting.

Resourcefulness

-10	-9	-8	-7	-6	-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5	+6	+7	+8	+9	+10

Question

I used to work at a Wire-House firm and, as financial advisors, we were required to track our daily activities.

What internal activities do you recommend we track?

PCI Times Quick Add

Date / Minutes

Date
Minutes

Save

PCI Times Most Recent

Date	Minutes
Feb 17, 2015	14
Feb 16, 2015	51
Feb 15, 2015	70
Feb 14, 2015	50
Feb 13, 2015	70
Feb 12, 2015	80
Feb 12, 2015	50
Feb 11, 2015	70
Feb 10, 2015	50
Nov 13, 2014	1260
Nov 12, 2014	99
Nov 11, 2014	92
Nov 10, 2014	93
Aug 06, 2014	141
Aug 05, 2014	141

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PCI Weekly Check In

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TA DAYS OFF NEXT WEEK

Feb 16 - Feb 22	AM	PM
Monday	☑	☐
Tuesday	☐	☐
Wednesday	☐	☐
Thursday	☐	☐
Friday	☐	☐
Saturday	☑	☑
Sunday	☑	☑

TA DEBRIEF LAST WEEK

Yes, TA was updated. ☑

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Up: Mark Little's Team

Potential-Client Interaction Tracking

PCI Time Hours 7-day rolling average	PCI Referrals Last 7 days	# Initial Client interviews Next 7 days	# Ideal Clients Added Past 90 days
7.6	10	1	5

Goal

PCI Time Hours 7-day rolling average	PCI Referrals Last 7 days	# Initial Client interviews Next 7 days	# Ideal Clients Added Past 90 days
7	10	2	3

Definitions

PCI Time:

Potential-Client Interaction™ Time is **only** that time invested face-to-face or on-the-phone with potential clients, for the purpose of moving towards an Initial Client Interview™.

PCI Weekly Checkins:

PCI Checkins once per week are a Toolkit Inner Circle™ requirement, whether the TA is putting in PCI Time that week or not. This allows us to accurately calculate PCI Statistics without requiring that you enter zeros every day. AMs are also meant to update the TA about the PCI Tracking progress at their weekly checkin meetings with their TA.

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Confirm the TA was updated about PCI Tracking statistics (during or since) last week.

PCI Referrals Quick Add

Date / Name

Date
Name

Save

PCI Referrals Most Recent

Date / Name
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TA DAYS OFF:

Check all/only the half-days that the TA is not planning to be working next week.

TA DEBRIEF:

Confirm the TA was updated about PCI Tracking statistics (during or since) last week.

PCI Referrals Quick Add

Date / Name

Date

Name

Save

PCI Referrals Most Recent

Date / Name
Feb 17, 2015 Dick VanDyke
Feb 17, 2015 Wilma Flintstone
Feb 16, 2015 Joe Mannix
Feb 16, 2015 Matt Dillon
Feb 15, 2015 Joe Hardy
Feb 14, 2015 Tom Hardy
Feb 13, 2015 Betty Rubble
Feb 12, 2015 Bob Brown
Feb 11, 2015 Benny Arnold
Feb 11, 2015 Willie Nelson
Feb 10, 2015 Festus Rains
Nov 13, 2014 Benny Arnold
Nov 13, 2014 willie nelson
Nov 12, 2014 Mr. Grey
Nov 12, 2014 Bob Brown

View All

Manage portlets

PCI Times Quick Add

Date / Minutes

Date
Minutes

Save

PCI Times Most Recent

Date	Minutes
Feb 17, 2015	14
Feb 16, 2015	51
Feb 15, 2015	70
Feb 14, 2015	50
Feb 13, 2015	70
Feb 12, 2015	80
Feb 12, 2015	50
Feb 11, 2015	70
Feb 10, 2015	50
Nov 13, 2014	1260
Nov 12, 2014	99
Nov 11, 2014	92
Nov 10, 2014	93
Aug 06, 2014	141
Aug 05, 2014	141

View All

PCI Weekly Check In

Saved

TA DAYS OFF NEXT WEEK

Feb 16 - Feb 22	AM	PM
Monday	✓	
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday	✓	✓
Sunday	✓	✓

TA DEBRIEF LAST WEEK

Yes, TA was updated. ✓

Save

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Up: Mark Little's Team

Potential-Client Interaction Tracking

PCI Time Hours 7-day rolling average	PCI Referrals Last 7 days	# Initial Client interviews Next 7 days	# Ideal Clients Added Past 90 days
7.6	10	1	5

Goal

PCI Time Hours 7-day rolling average	PCI Referrals Last 7 days	# Initial Client interviews Next 7 days	# Ideal Clients Added Past 90 days
7	10	2	3

Definitions

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PCI Weekly Check In

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Feb 16 - Feb 22	AM	PM
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Friday		
Saturday	✓	✓
Sunday	✓	✓

TA DEBRIEF LAST WEEK

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Actions ▾ | Display ▾

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Goal	Goal	Goal	Goal
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Trusted Advisor ToolKit.com

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Monday	☑	☐
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Wednesday	☐	☐
Thursday	☐	☐
Friday	☐	☐
Saturday	☑	☑
Sunday	☑	☑

TA DEBRIEF LAST WEEK

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