

Fishing in The Right Ponds

Where To Find
The Ideal Clients You Want



The Mark of Mastery™

The Biggest Client Acquisition Obstacle

*Unimpressive Work **Product***

*Comprehensive Financial Services with no client **gameplan***

*A Planning firm with no **plan***



Fishing In The Right Ponds

***PROBLEM:** I need to acquire more and better Ideal Clients*

That's a **symptom** of the problem, NOT the **root cause** of the problem

- ✓ I don't know enough Potential Ideal Clients
- ✓ My friends & acquaintances don't meet my Ideal Client Profile
- ✓ I'm struggling finding where my Potential Ideal Clients are
- ✓ I'm not Fishing in The Right Ponds

Now we have the root of a problem that can be **quickly solved**

Fishing In The Right Ponds

Fishing In The Right Ponds

We all run in various circles with different people in our day-to-day lives

- ✓ Family
 - ✓ Kid's sports
 - ✓ PTA Meetings, parent/teacher conferences
 - ✓ Family dinners
- ✓ Friends
 - ✓ Neighborhood groups (HOA)
 - ✓ Poker night / Bowling / Chess
- ✓ Fitness
 - ✓ Workout or running buddies
 - ✓ Tennis / Golf / Pickle ball
- ✓ Faith
 - ✓ Bible study, Small Group
 - ✓ Church volunteer service, ministering to others' needs

Fishing In The Right Ponds

Your Client Acquisition 2-Step Project...

1. Select the ponds with the highest concentrations of Potential Ideal Clients.
2. Then actively rub elbows with as many people as you can, but *with no ulterior business motives* whatsoever

The **accelerated** Client Acquisition strategy

Fishing In The Right Ponds

Is this work, or is this play?

*“I like having interesting conversations
with interesting people”*

- Bill Bachrach

If you did this 3-4 times a day,
would you consider that work?

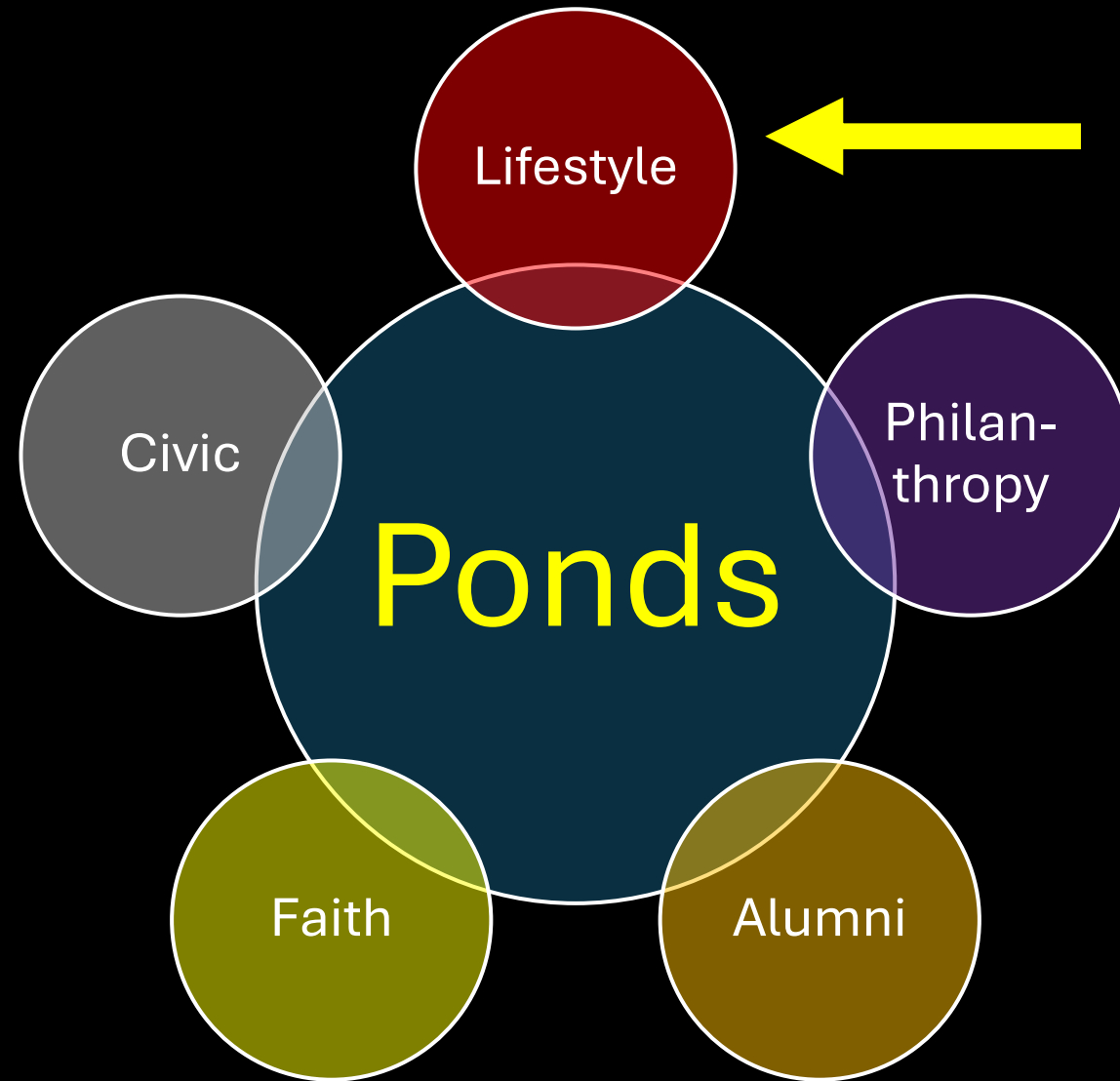
Fishing In The Right Ponds

Fishing In The Right Ponds

Ideal Client Profile

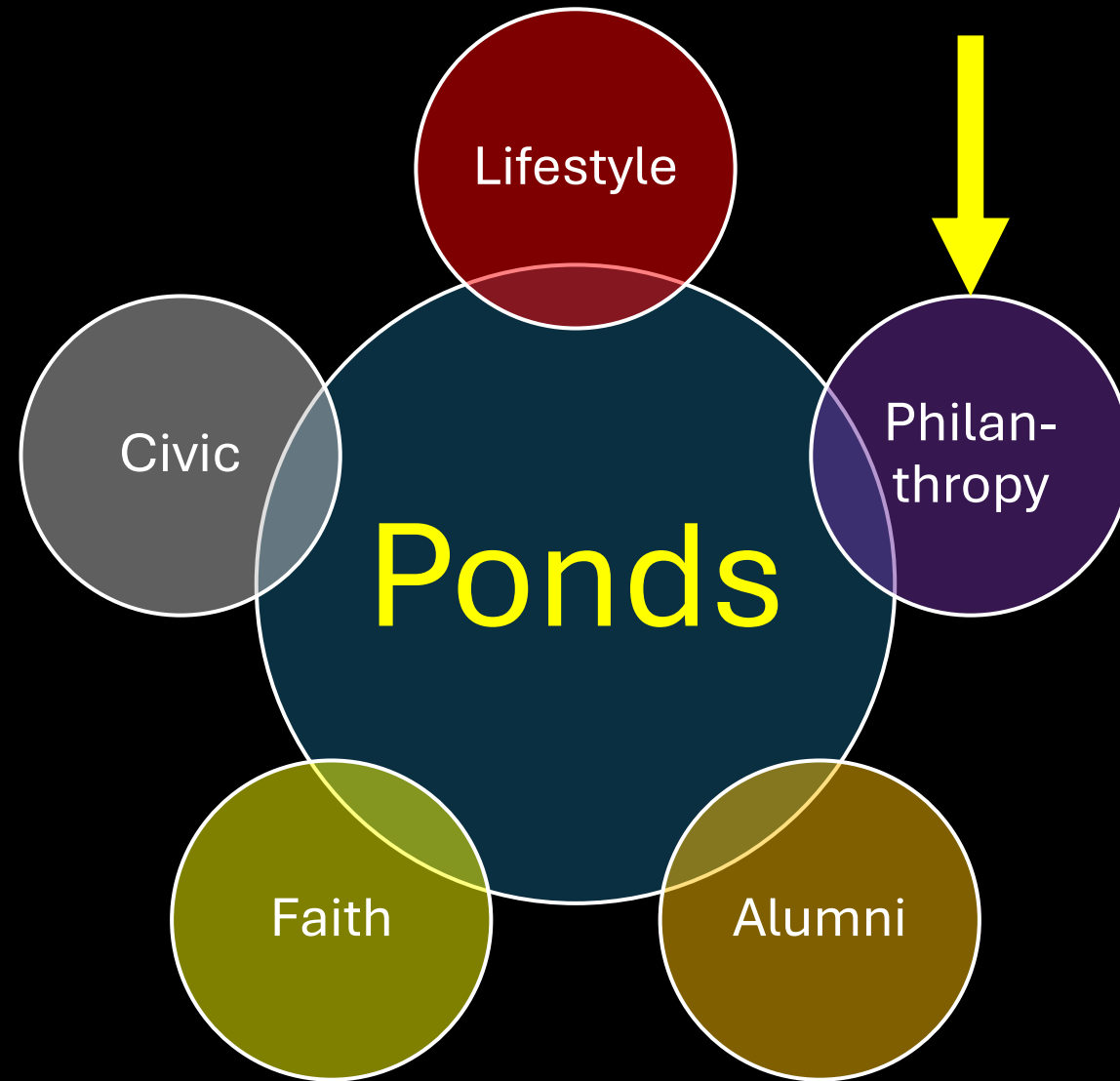
- Financial delegators who are...
- Small business owners
- Key corporate executives

Always start at the top
(Their referrals respect them)



Social & Lifestyle Circles

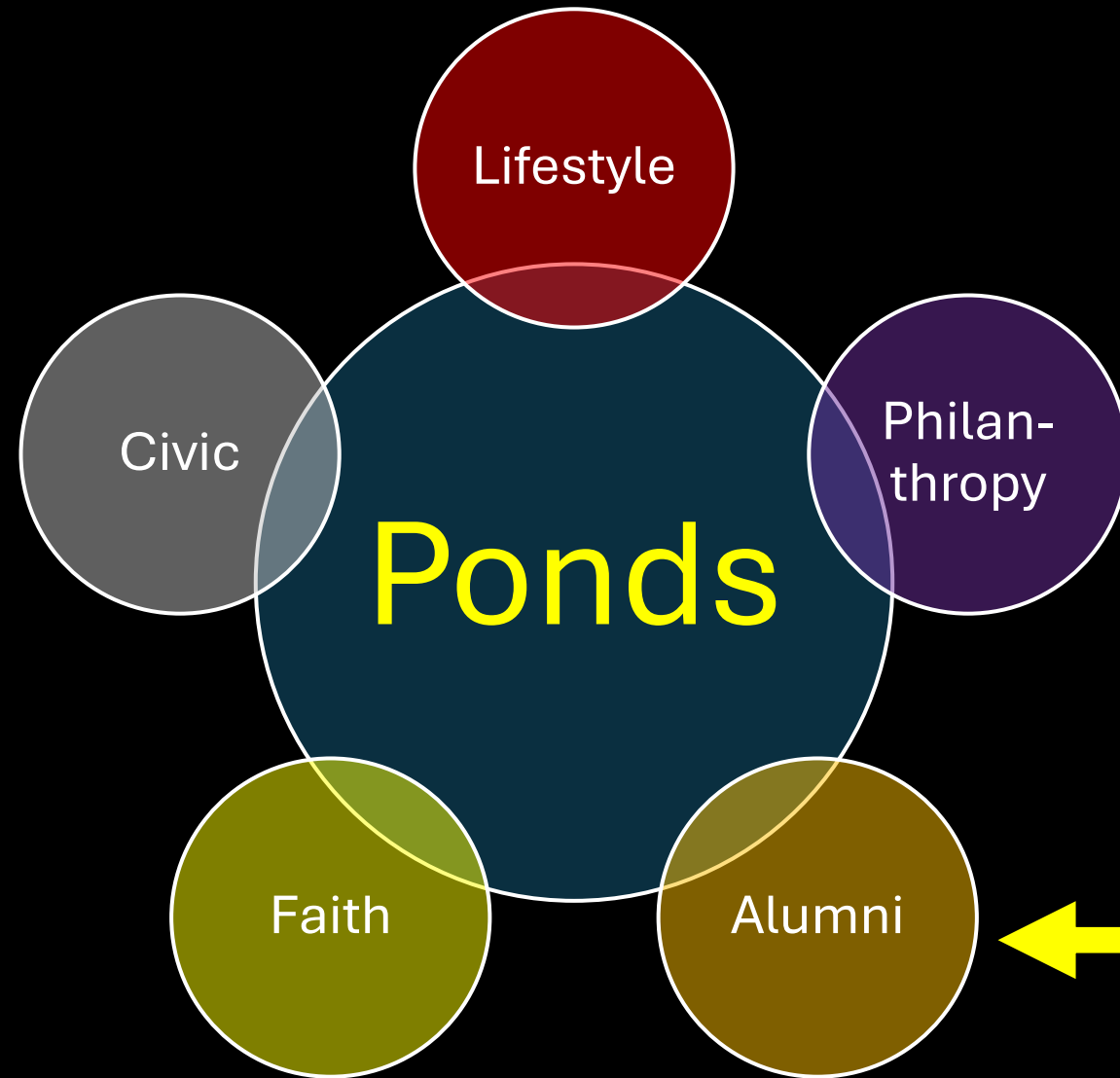
- ✓ Private Membership & Country Clubs
- ✓ Health, Fitness & Lifestyle Circles
- ✓ Affluent Hobbyist & Collector Circles



Philanthropic & Cultural Circles

- ✓ Foundation Boards
- ✓ Arts, Culture & Heritage Circles

(Where affluent people give back, build legacy and express values publicly)

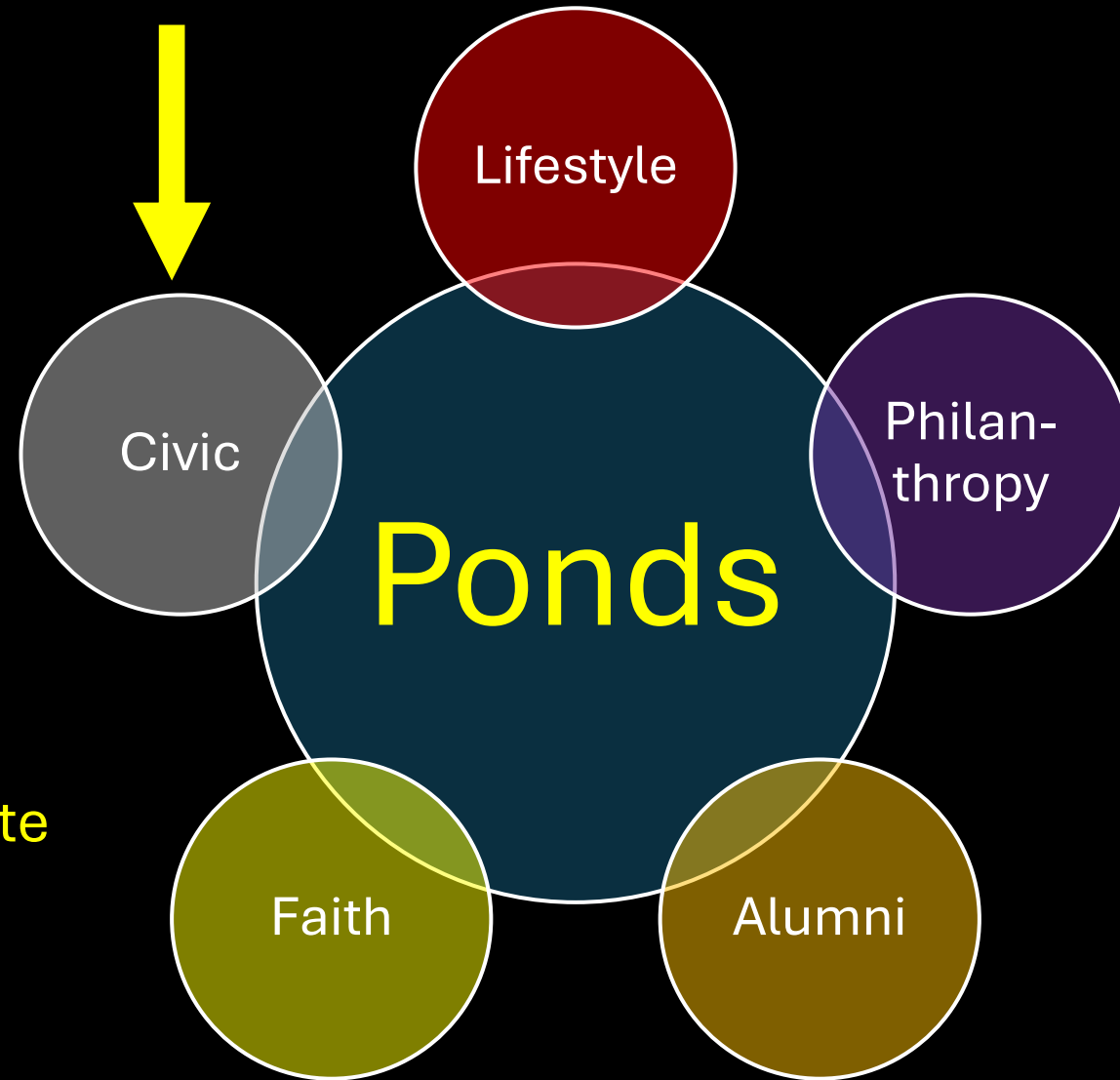


Educational & Alumni Circles

- ✓ Your children's school (PTA)
- ✓ Your school
- ✓ Your associations

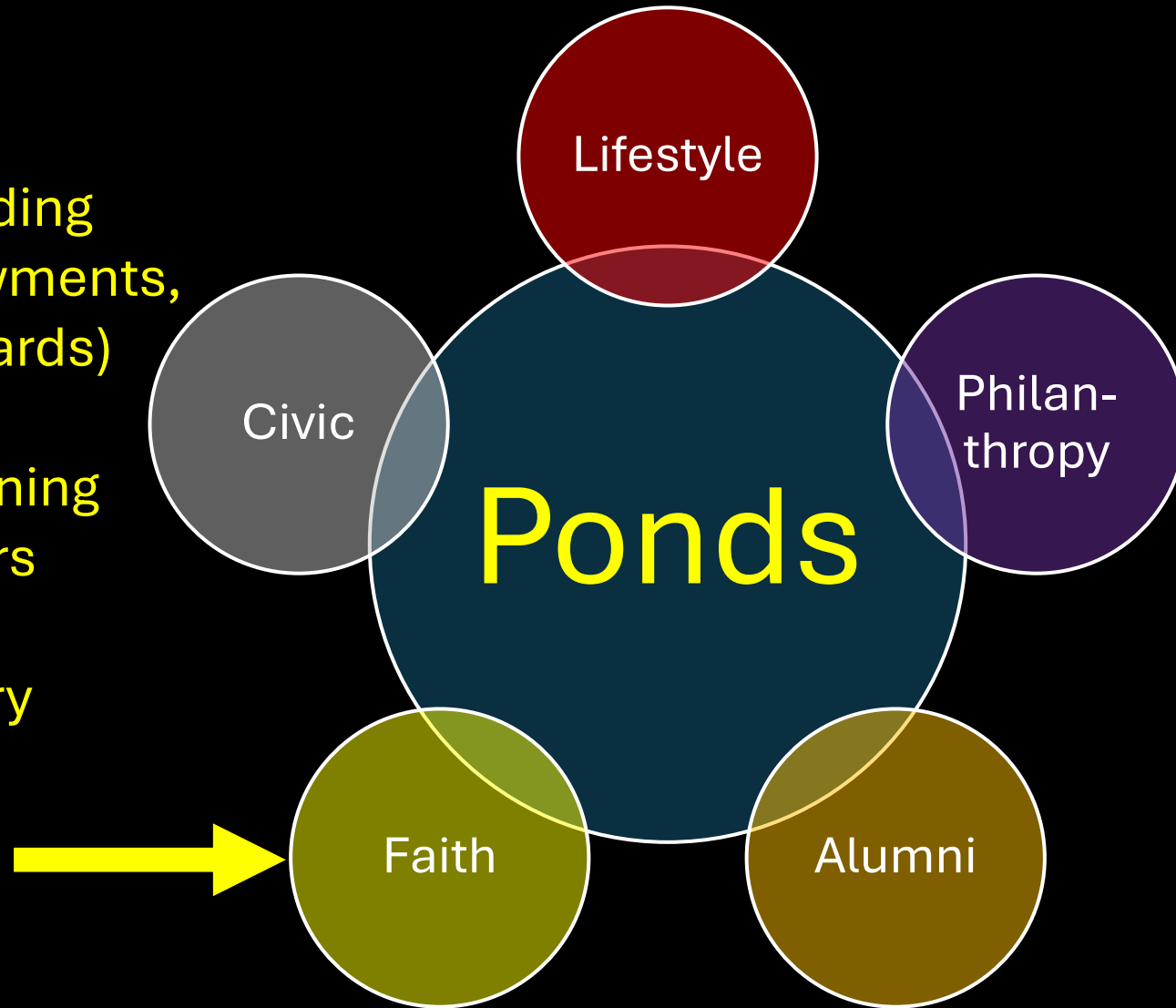
CIVIC & ECONOMIC DEVELOPMENT CIRCLES

- ✓ Local policies
(chamber)
- ✓ Local issues
(non-profits)
- ✓ Support a candidate
for election



FAITH CIRCLES

- ✓ long-term funding boards (endowments, foundation boards)
- ✓ Church Governing Board members
- ✓ Hear their story



Fishing In The Right Ponds

Once you identify a pond your friend is fishing in, what then?

YOUR GOAL with every “pond”... **why** involved & with **whom**?

- ✓ Identify the leaders, the 20% that make it all happen
- ✓ Meet the movers & shakers
- ✓ Meet the ones who are making a difference
- ✓ (your goal is to **meet** the board, not **join** the board)

The FIRP Conversation

*Helping affluent people to
open up to you...*

*Sharing with you the **circles** in which they run*

The FIRP Conversation

*Getting the people you **know**...*

*...to introduce you to the people you **don't** know*

1. **Identify Circles:** Identify in which circles your friend travels
2. **One-at-a-time:**
 - ✓ What's the group about? What motivates you to be involved?
 - ✓ Tell me about the people in the group. Who are the key people?
3. **“I'd love an introduction”**

*For some reason, most people **seldom ask** friends about other ponds*





The FIRP Conversation

*Getting the people you **know**...*

*...to introduce you to the people you **don't** know*

1

*“So what do you do when you’re not at work
or home with the family?*

What other things do you spend time doing?”

The FIRP Conversation

*Getting the people you **know**...*

*...to introduce you to the people you **don't** know*

2

“Why this group?”

*“Of all the things you could do with your time,
how did you choose this effort”*

“So the group is making a difference, in your view?”

***“Who are the leaders most responsible
for the group’s success?”***

The FIRP Conversation

*Getting the people you **know**...*

*...to introduce you to the people you **don't** know*

3

“Who’s the leader of that group?”

“Who impresses you the most”

“Who’s making the biggest difference in that group?”

“I’d love to meet ‘em!”

The FIRP Conversation

*Getting the people you **know**...*

*...to introduce you to the people you **don't** know*

3

It's literally that simple

“I'd love to meet 'em!”

The FIRP Conversation

LISTENING FOR

*Any **person** or **circle** that interests you*

You have 2 goals:

To meet new people & explore new ponds

Fishing In The Right Ponds

I need to meet affluent business owners & corporate execs...

I just moved back to Fort Worth, TX & I need to begin meeting lots of new people who might be Potential Ideal Clients...

- ✓ I want to be Fishing in The Right Ponds, so that I'm rubbing elbows with a high concentration of Potential Ideal Clients (PICs)
- ✓ I want to meet PICs socially, on a personal basis, so create a list of places where I could get involved and meet many PICs
- ✓ In the past I've enjoyed...
 - ✓ Tennis, Golf
 - ✓ I enjoy involvement in the chamber & Small Business groups
 - ✓ I'm active in my church and enjoy serving with charities

Mark's FIRP Candidates

ChatGPT's profile questions to me

- 1.What geographic radius do you want to focus on for identifying local circles or ponds in Fort Worth?
- 2.How many hours per week are you realistically willing to devote to active participation in these organizations?
- 3.What type of involvement do you enjoy most—leadership, committee participation, or hands-on volunteer work—and how much of each would you like to balance?
- 4.Would you prefer to primarily serve at the board or leadership level, or do you want to mix that with some annual hands-on volunteer participation?
- 5.Should we prioritize circles that have the highest concentration of affluent multimillionaires, even if they don't perfectly align with all your personal interests and values?
- 6.Do you already have any established relationships or affiliations in Fort Worth that could provide entry points into these circles?
- 7.Among your current high-end clients, what common interests, clubs, activities, or causes do they hold that could indicate similar ponds in Fort Worth?

Mark’s FIRP Candidates

Groups with high concentration of Potential Ideal Clients

Category	Recommended Pond	Why It’s Strategically Valuable	Engagement Strategy
1. Social & Lifestyle (Elite Leisure)	Colonial Country Club	Fort Worth’s most prestigious golf club, host of the Charles Schwab Challenge, dense with affluent business owners and legacy families.	Join or build relationships through existing members (TCU or Chamber). Attend charity tournaments and member-guest events.
2. Philanthropic & Cultural	Kimbell Art Museum – Board / Patron Circle	Center of Fort Worth’s art philanthropy. Board and donor circles include oil, banking, and legacy family wealth. Excellent for faith-based patrons who prefer representational/ Western art over modern.	Attend donor previews, volunteer for fundraising galas, and express interest in educational or preservation committees.
3. Professional & Business Leadership / COI	Fort Worth Chamber of Commerce – Executive Council / Leadership Fort Worth	High concentration of small-business owners, civic influencers, and mid-market CEOs. Aligns perfectly with your small-business advocacy background and Governor’s Conference history.	Reconnect through the Chamber president or local board; request to join an advocacy or economic-development committee.
4. Education & Alumni / Youth Mentorship	Junior Achievement of the Chisholm Trail – Board / Leadership	Premier organization connecting business leaders with youth education. Its leadership circle contains top civic and business figures.	Serve on the board or major-donor committee; teach one class each year to stay hands-on.
5. Faith / Civic / Values-Based Leadership	Gateway Church – North Fort Worth Campus (4209 Basswood Blvd, 817-552-7581)	One of the largest interdenominational churches in DFW. Combines faith, business leadership, and community outreach. Affluent, entrepreneurial congregation.	Join stewardship or foundation committees, attend men’s leadership events, and explore business-ministry partnerships.
Bonus: Hobby / Collector	MotorSport Ranch (Cresson, TX)	“Country club for car enthusiasts.” Strong overlap with business owners and high-income professionals who race domestic high-performance cars.	Visit as a guest first; evaluate the member base. Consider a social membership if the culture aligns.

Mark's FIRP Candidates

Groups with high concentration of Potential Ideal Clients

Colonial Country Club		Fort Worth's most prestigious golf club, host of the Charles Schwab Challenge, dense with affluent business owners and legacy families.	Join or build relationships through the club. Attend charity tournaments and events.
2. Philanthropic & Cultural	Kimbell Art Museum - Fort Worth	who prefer representational / Western art over modern.	Express interest in the museum, volunteer for fundraising galas, and express interest in educational or preservation committees.
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Kimbell Art Museum – Board / Patron Circle		Center of Fort Worth's art philanthropy. Board and donor circles include oil, banking, and legacy family wealth. Excellent for faith-based patrons who prefer representational / Western art over modern.	Attend donor previews, voice interest in educational or
3. Professional & Business Leadership / COI	Fort Worth Chamber of Commerce – Executive Council / Leadership Fort Worth	Fort Worth Chamber of Commerce connects business owners, entrepreneurs, and mid-market CEOs. Aligns perfectly with your small-business advocacy background and Governor's Conference history.	Reconnect through the Chamber president or local board; request to join an advocacy or economic-development committee.
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Fort Worth Chamber of Commerce – Executive Council / Leadership Fort Worth		High concentration of small-business owners, civic influencers, and mid-market CEOs. Aligns perfectly with your small-business advocacy background and Governor's Conference history.	Reconnect through the Chamber, join an advocacy or economic
4. Education & Alumni / Youth Mentorship			...each one class each year
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4. Education & Alumni / Youth Mentorship			Join a major donor committee; teach one class each year
	Gateway Church – North Fort Worth Campus (4209 Basswood Blvd, 817-552-7581)	One of the largest interdenominational churches in DFW. Combines faith, business leadership, and community outreach. Affluent, entrepreneurial congregation.	Join stewardship or foundation events, and explore business opportunities.
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Fishing In The Right Ponds

GO TO TRACKING SHEET...

Here's the tracking procedure...

- ✓ List the top 3 FIRPs (assign a Ticker Symbol to each)
- ✓ Create “Literally Everyone I Know” list (add new names weekly)
- ✓ Get out of the office and have The FIRP Conversation with 10-20 people a week

Fishing In The Right Ponds

Why grabbing coffee acquires Ideal Clients faster...

There's a massive Trust Deficit in the world right now
The Trust Equation...

$$\text{Trust} = \text{Integrity} + \text{Authority(t)}$$

Catching up with a new friend over coffee achieves trust after 4 coffees



Exponential Growth

Awareness of your reputation grows exponentially

$$2^n$$

viral coefficient > 1

...meaning every client brings in more than one new client,
on average, producing compounding reach.

Exponential Growth

Awareness of your reputation grows exponentially

2 Referrals

Per client, on average

...the goal is >1

Personal Ponds, Personal Basis, Change Reputation



The Star Advisor

1. **Client Satisfaction:** Undisputably the #1 Financial Advisor in your market
Annual client referral rate (ACRR) is $\Rightarrow 1$
2. **Growth:** Growth of new revenue is between
10% per month – 10% per quarter (at least 40% annually)
3. **Sustainable:** The other 2 metrics increase
with or without your presence in the business

...Then you are The Star Advisor in your market

Fishing In The Right Ponds

Group Q&A on Fishing in The Right Ponds this Thursday...

Thu Oct 16

1.00p Pacific

2.00p Mountain

3.00p Central

4.00p Eastern

For all members of The Mark of Mastery

The program is no charge

Look for the meeting link by Email

My current national research project

What's working for the most successful Comprehensive Financial Advisors right now...

The biggest challenges being faced right now
&

The best strategies that are resolving today's biggest problems
for High-end Financial Advisors

Not too late to participate

I'll be sharing all the interim results before the end of October

