

My experience working with Mark and Rick has been very positive. They've helped me steadily increase my client acquisition, you know, following a, non-salesy process to get in front of more potential ideal clients and acquire more ideal clients. I've learned how to have meaningful conversations with people and clarify and truly understand their biggest significant financial issues and the potential roadblocks to those and creating an outcome that works for them to achieve their goals.

The single biggest thing that I've taken away is, I think, being present in conversations and truly understanding, you know, the objectives, the concerns, the issues that people are having and having empathy towards what they're going through and being able to create a solution that is aligned with their objectives.

This coaching is very different because it focuses, I think, in the real world and on relationships and human conversations and interaction, which I think is missing in the marketplace. So, I have received great value from the training from Mark and Rick, and I've increased my revenue on a steady basis. I've increased, um, my financial roadmaps. I've increased the number of plans we've created, we've had success building our team. We've had success hiring new Administrative Managers. So yes, it's been of, of great value. Absolutely.

I've become much more client-focused, a much better, I think, listener and showing people a lot more empathy and truly trying to understand what they're trying to achieve and operate as a fiduciary and not a salesperson. So absolutely, I'd recommend this training for other financial advisors and/or professionals who, you know, can tap into their, their knowledge and expertise to grow their practices.

The additional revenue I've generated, working with Mark and Rick, is approximately \$500,000. I've increased my client base by, 50 new families since working with Mark and Rick. Following the advice of Mark and Rick, I've now been able to actualize, my financial roadmap and, start the next phase of my life, at age 54, in Costa Rica.