

I engaged with Mark and Rick about two and a half years ago because my business had stalled. I had decent revenue, you know, a big team, but I knew it could go faster, I knew it could go further, I knew there was the next level. And in the two and a half years working with them, the results have been tremendous. Over the last couple years, I've added eight new additional ideal clients that generate over \$300,000 in annual recurring revenue, and my margins have doubled. So, the net income to me has been well over a half a million dollars a year, directly due to the coaching I've received from Mark and Rick. So, I've been very pleased with it and couldn't recommend 'em more highly.

The biggest thing that set them apart from other coaches, other business coaches, other advisors' coaches, is their accessibility. So, whenever I need help, I mean, sometimes every day, sometimes on when I'm driving or there's just an issue, a staff issue, a client issue I need to work with, they're there. They're quick. They're accessible. They have the, the context and the history, the background to give personalized advice that really makes a difference for me. So, I'm not spending a lot of time explaining the situation and going through the model and walking them, bringing them up to speed. They're helping very quickly. They have the tools. They have the experience. They sent me on, on the right course, very quickly. So, that's very different from other business coaches that I felt like I needed to spend a couple months kinda explaining what we're doing in being a high-end advisor. But they've coached high-end advisors for over 20 years, so they get it, and now they're taking me to the next level.

There is a next level, so I can be kind of an impatient guy, so I've had some growth, but I'm excited about the future. They're directly helping me grow the service, grow the team, grow our client community. I'm right in the middle of a fee raise. Because we're delivering significantly higher levels of service, we are raising fees for clients, and that will result in over \$250,000 more in annual recurring revenue, which will even help margins even greater.

So, in the last couple years working with Mark and Rick, I've taken a lot of notes. We talk every week, sometimes every day, as I mentioned. I looked the other day, I've taken 129 pages of notes. So it's this long Word document that's really become the cornerstone for how I run the business on all sorts of issues that have really made a difference. So, they're, they're excellent at results. They're also excellent at calming me down when I get a little impatient. I always want things to go faster and more efficiently, and they've helped me realize that even little progress is still steady progress, and as long as you're moving in the right direction, you might look back and be surprised by how far you've gone.

So, that's been helpful kind of from a peace perspective and mental health note, just knowing that it doesn't always need to be 10X like I'd want. So, hey, if you're the type of advisor that wants customized advice, that wants to be a high-end advisor and grow even more rapidly, I couldn't recommend them higher. They're excellent. You won't regret it. And eventually, I'd love to hear about your success as well.