## **There are 3 Training Paths**

Three separate Programs for mastering 3 separate skills

#### Lead Conversion

The skill of converting a Potential Ideal Client into an actuall paying client in a single 1-hour meeting



The Advisor P.A.C.T. Monthly Program<sup>™</sup>

#### **Client Service**

- Client Satisfaction: Your team is consistently exceeding Ideal Clients' expectations.
- ✓ Growth: Team success and client satisfaction is measured by your client referral rate over the past 12-months.
- ✓ Profitibility: Your margins exceed 50% for every Financial Service you provide
- ✓ If ever you decide you want the Client Acquisition module, it's available as an add-on for 50% to existing system users
- ✓ The Greatest Marketing Machine Ever Devised for Financial Advisors (GMME Module) : \$1,400 (which is ½ the regular fee)

#### **Lead Generation**

✓ Having ample people who *want to* sit down with you to "talk business".
✓ Every week your schedule is filled with Potential Client appointments
✓ Mastering the skill of interacting with people in a way that, if it's a good fit, they'll *proactively want to* schedule time to sit down and "talk business" with *you*

# Each Program Has 3 Levels of Coaching

You get to decide how much one-on-one help you need





#### Self Paced - do-it-yourselfers

- This is the program everyone starts with so you can implement at your own pace.
- ✓ You receive at least one (1) new project each month, in sequence.
- You have access to one-on-one coaching scheduled every month at *The Monthly Session*™ (if you participate)



### Weekly Coaching program

- ✓ In addition to the Self-paced program above, you have access to drop-in sessions to receive one-on-one coaching.
- ✓ At least once every week, you'll be provided access to "Mark's Office Hours,"
- ✓ These are drop-in sessions where advisors who have questions can work-through questions & issues faced.
- ✓ First come, first served basis

#### 6-Month Sprint

- ✓ Direct One-on-one Coaching
- ✓ Everything above Plus a weekly one-on-one coaching / accountability session.
- ✓ Every participant is asked to submit a weekly accomplishments report.

### Each Program Has 3 Levels of Coaching

How do I decide which is right for me at the moment?



#### **Self-Paced Program**

If you're able to implement on-schedule and meet your goals with a single monthly coaching session, *then remaining in this program is best for you*.

#### Weekly Coaching Program

If you're not implementing effectively, or quickly enough, then switch to the weekly coaching program. See if more direct-access and more **one-on-one coaching accelerates your results**. [NOTE: You may only switch once every 12-months]

#### **6-Month Sprint**

You know that feeling when things begin to "click?" When you feel that you're on a roll and are ready to "jump in the river" fully and sacrifice a bit for the next 6-months, this program is perfect.

Make it your goal to get more done in 6-months than you have in the last 3-years

## **Affect of Increased Dedication & Coaching**

Expect greater results with increased resolve and one-on-one advice

#### The top performers have coaches

- ✓ I've been in this industry over 30-years & every top performer I've known has at least one coach.
- ✓ I was the #1 producer at my nationwide broker/dealer for over a decade (until I left)... I've had 4 coaches I to whom I attribute my success.
- ✓ I still hold the record as Bill Bachrach's "poster child,"
- ✓ Moving from 17 Ideal Clients to 100 Ideal Clients
- ✓ Acquiring 83 NEW Ideal Clients in 34 months
- ✓ Increasing revenue from \$342k/yr \$1.6m/yr
- ✓ Maintaining an annual client referral rate of 9 -15 month after month... year after year... for many years (even after I stopped accepting new clients)
- ✓ I tell Anne & Bill Bachrach all the time that there aren't many people you can point to and say,

"I currently have millions of dollars that are directly attributable to those 2 people"





# Advance to Next Program Only if You NEED It.

Advance to the next level of coaching once you've begun seeing results



#### 6-Month Sprint

Once you're feeling some success and are getting a bit of traction, and you want to seriously ramp-up your results then "Contact Us" and ask to switch to The 6-Month Sprint: **\$11500 or \$1000/mo** 

#### Weekly Coaching Program

If you need more coaching in one of the programs, or if you want to accelerate your results, then "Contact Us" and let us know that you want to switch to the Weekly Coaching Program: \$3500 or \$300/mo



#### Self-Paced Program

If you're getting the results you hoped for in this program at the speed you wanted, then stay right here in your current program ... you're doing great.

If you need to add the Client Acquisition module, just "Contact Us" and we'll send you a link to add that module: \$1400 or \$120/mo