Workbook

The Only Game In Town

10 Game Changing Strategies For Financial Advisors

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10 Game Changing Strategies For Financial Advisors

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Workbook Instructions

- ✓ Print out this workbook right now. NOTE: To save printer ink, instruct your printer only to print out pages 2-34 of this workbook (Omit the workbook cover).
- ✓ Keep your workbook handy when you're listening to or working on these courses.
- ✓ Make all your notes in this workbook (feel free to use the blank pages on the back too).
- ✓ To ensure you've mastered the essentials in each section, complete all the questions and exercises before moving on to the next session.

10 Game Changing Strategies For Financial Advisors

Are You Crazy or is the World Crazy?

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6 Fundamental Laws for Becoming Indispensable

. Describe the only way to positively impress anybody.
·
. Describe why "the client experience" is the only way your client ever knows which standards you actually live up to
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	tit's the "client's standards" that determine "the client experience" that you need to live up to.
Why is it tha	at the more successful and affluent the client, the higher their standards are for "the client experience

 " determines who v	, 		
iicidi Auvisoi's II diio	ther advisor's chi	ent experience so	eems to demonstrate
a client will switch Final			a client will switch Financial Advisors if another advisor's "client experience" so

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Designing Your Ideal Business Around What Clients Already Want

veen the two?	
	siness activities you love doing the most (and note how many hours you've invested doing those
	siness activities you love doing the most (and note how many hours you've invested doing those last month).

	ast month).		hours you've investe	
you have a b	usiness or a job? (Mak		you prefer.	

	ou as more of a s	trategist or more	of a tactician?	Provide examp	les and evider
			of a tactician?	Provide examp	les and eviden
			of a tactician?	Provide examp	les and evider
			of a tactician?	Provide examp	les and evider
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			of a tactician?	Provide examp	les and evider
			of a tactician?	Provide examp	oles and evide

which role do yo ails?)	ou enjoy more, strategist or tactician? (Creation & oversight of the strategy, or implementing the
xplain how offe	ering services that clients say they want is better than limiting services to those we want to provide
	

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ecific services tl		are your clien	ts willing to pa	y the most?	
		are your clien	ts willing to pa	y the most?	
		are your clien	ts willing to pa	ny the most?	
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		are your clien	ts willing to pa	y the most?	
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vhat ways	do your clien	ts describe y	ou as "worth	y of trust?"		
vhat ways	do your clien	ts describe y	ou as "worth	y of trust?"		
vhat ways	do your clien	ts describe y	ou as "worth	y of trust?"		
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what ways	do your clien	ts describe y	ou as "worth	y of trust?"		
what ways	do your clien	ts describe y	ou as "worth	y of trust?"		

	urrently doing for clients that makes you different or better than the other Financial Advisors (List specifics that distinguish you from your competitors.)	,
scribe the 3 l		
	pasic types of clients and how many of each you currently have.	
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vast majority of your Potential Ideal Clients would significantly prefer learning about you. eans do potential clients prefer discovering skilled Financial Advisors?)

Attracting Ideal Clients

tne 3 types	s of referrals,		-				
alain why th	he lack of a c	ontinual street	aam of client	referrals is a s	ign of dysfund	rtion	
plain why th	he <i>lack</i> of a c	ontinual stre	eam of client	referrals is a s	ign of dysfund	ction.	
plain why tl	he <i>lack</i> of a c	ontinual stre	eam of client	referrals is a s	ign of dysfund	ction.	
olain why tl	he <i>lack</i> of a c	ontinual stre	eam of client	referrals is a s	ign of dysfund	ction.	
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plain why ti	he <i>lack</i> of a c	ontinual stre	eam of client	referrals is a s	ign of dysfund	etion.	

nce it's clear to	others that your standards exceed theirs, w			
				
	ame" sounds like a lot of extra work, describ	e how much extra wo	ork it takes to build your	busine
		e how much extra wo	ork it takes to build your	r busine
		e how much extra wo	ork it takes to build your	r busine
		e how much extra wo	ork it takes to build your	r busine
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		e how much extra wo	ork it takes to build your	busine

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You Are Sitting on Acres of Diamonds

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ake a case for	how you acti	ually might	be sitting or	n "acres of dia	monds."		

You Are Sitting on Acres of Diamonds

	tes that clients are not sufficiently impressed to introduce you to others.
	
	taneous unsolicited referrals have you received in the past 12 months and describe what you feel
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	taneous unsolicited referrals have you received in the past 12 months and describe what you feel

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			e clients?	

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n Client Me				
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	s are to your clier	nts? Why?		

Crushing It In Client Meetings

n a scale from 1	-10, how excited are	e your clients to r	neet with you! Di	<u> </u>	
	u ensure your client				
	u ensure your client ow do you ensure yo				

	important that every	y client meeting h	as a high-priority	conversation on t	ine agenda, design	ea to i
lient financia	ly and emotionally.					
	ant that all your clie	ents leave each me	eeting with an ove	rwhelming sense	of confidence that	they
	ant that all your clie	nts leave each me	eeting with an ove	rwhelming sense	of confidence that	they
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		ents leave each me	eeting with an ove	rwhelming sense	of confidence that	they

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pressive to them.			
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plain why clien	Clients Love (And Hat s perceive that they need to s	mation contained in eve	ry report you pro
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		mation contained in eve	ry report you pro

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orts you provide you (rather than perforr			owards your clients' icators)?

entages?					
n reports you	provide, how easy is it for	your client to qu	iickly assess botto	m line impacts fo	r them?

w often are	there errors in your reports? Why are even the smallest errors in reports a 'major disaster'?
y do clients	like reports that tell them exactly what they need to do, step-by-step, to remain (or get) on-track
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y do clients	like reports that tell them exactly what they need to do, step-by-step, to remain (or get) on-trac

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The Critical Path To Getting More Done

	ies clear and written down	? What are most Fin	ancial Advisor's two pri	orities?
Do you know w	hat your critical tasks are to	o get your business w	vhere you want it to be	?

t does this tell you	about your priorities?

ach week do you spend doing everything else? What does this tell you about your priorities?
o you invest figuring out what you should be doing <i>right now,</i>
o you invest figuring out what you should be doing <i>right now,</i> ent throughout your day?

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hat more cou important act	ld you do each day to	o "create time" for	more important to			
iiiiportaiit aci	ion items:					
	r Relationships			e important activ	ities?	
	r Relationships			e important activ	ities?	
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Clients Prefer Relationships Over Technology

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	ou describe your	"client experiend	ce" being as well-cl	noreographed as a	"Disney experience," l
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what ways can y y World?	ou describe your	"client experienc	ce" being as well-cl	noreographed as a	"Disney experience," I
	ou describe your	"client experienc	ce" being as well-cl	noreographed as a	"Disney experience," I
	ou describe your	"client experienc	ce" being as well-cl	noreographed as a	"Disney experience," I

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ney experience	eve the impact would be on your business if your meetings were just as well-choreographed as a ?"
	on't Climb Itself threads which have run throughout this essential course tying it all together.
	on't Climb Itself threads which have run throughout this essential course tying it all together.

The Ladder Won't Climb Itself

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