



### **Expected Outcomes:**

Ultimate Goal: Growth of Advisor Business

Secondary Goals: Improve Investor Behavior, Reduce Knee-Jerk Reactions, Differentiate Yourself, Earn Trust From First Contact, Increase Real & Perceived Value, Gain Confidence in Self, Be Superior Choice

### **Challenges We Face:**

Our Nemesis: The financial media is our primary enemy. They know about human weaknesses & biases and employ strategies to take advantage of them for their profit and the peril of the individual investor

Other Factors: We are hardwired to seek mental shortcuts and are emotional beings. These are heightened in periods of anxiety and uncertainty.

### **A Guide with a Plan:**

- I am one of you. Advisor since 1999 and a behavioral finance expert since 2011, when I obtained a master's degree in Applied Economics with research on investor behavior
- I have personal experience with what works when communicating with clients and what doesn't. I share that with you in weekly coaching messages, monthly client content (white labeled) and many behavioral tools I have created for your use
- When you join, I get to know you and your business. It's not about making any radical changes to you process. Most of the time they are minor adjustments that have significant influence because we incorporate psychological factors
- Learn more about what working together looks like depending on which membership plan is right for your business.

### **Your Time Commitment & Expected ROI:**

- A few hours of your time in the first month as I share with you how to leverage and implement resources for your business. But once we are set up, it takes advisors less than one hour per month to get full value.
- If this helps you gain or retain one account per year, it has more than paid for itself. Check out what advisors say they value about the Network, including Phil Gose who has closed significant business from utilizing these resources and coaching assistance.