The Trusted Advisor Toolkit™

TrustedAdvisorToolkit.com

What is The Trusted Advisor Toolkit™?

The TrustedAdvisorToolkit™ is a turn-key practice management operating system

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What is The Trusted Advisor Toolkit™?

Client
Acquisition
System

Full-delivery of
comprehensive
financial services

What is The Trusted Advisor Toolkit™?

Helps financial advisors get control of their business, rather than allowing their business to control them.

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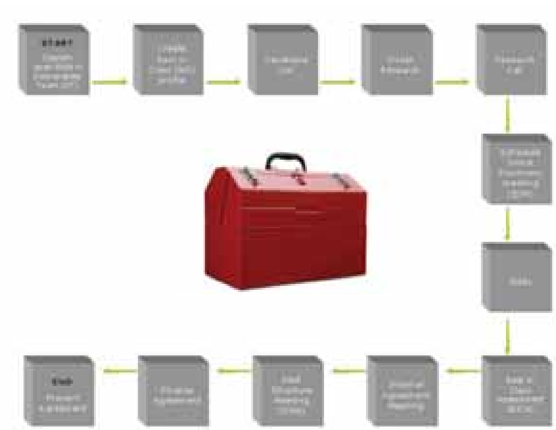
Advisors Who Implement, End up with…

- A turn-key, practice management system
- Providing fully comprehensive financial services
- Through an outsourced team of best-in-class Subject Matter Experts
- They learn how to
  - Build it,
  - Delegate it and
  - Orchestrate it



The Trusted Advisor Toolkit™

We all know that those advisors who deliver the most comprehensive financial services *command the highest fees*, and are the most *indisponsible to their clients*.

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To Get More Referrals You Have To Be More Referable...

- **The Trusted Advisor Toolkit™ defines comprehensive financial services in specific terms for Potential Ideal Clients.**
- **We're in the business of training financial advisors to deliver comprehensive financial services as defined by the 143 Deliverables Checkpoints™ we provide our members.**
- **Radically Different Advisor Value Proposition: We hold a Best-in-Class Deliverables Team accountable to 143 point annual checklist so that your financial house is in perfect order, and stays that way... for the rest of your life.**

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Issues The Toolkit Addresses

Advisor "Issue"	The Trusted Advisor Toolkit™ Resolves
Industry is unable or unwilling to specifically **define comprehensive financial services** for advisors and clients	✓
Many advisors have no **organized process** for delivering consistent comprehensive financial services	✓
Advisor tendency to position themselves as experts in finance utilizing a "One Man Band" business model rather than building a **team of experts**	✓
Office processes need more **consistency**	✓
Team Members unsure "**what to do**" & "**how to do it**," or **when**	✓
Advisors would prefer not to train their support folks & would rather spend their time with client acquisition activities and serving clients	✓

To Get More Referrals You Have To Be More Referable…

1. The Toolkit has a specific strategy: Deliver comprehensive financial services through The Three Meeting Process™ by a Best-in-Class Deliverables Team of Subject Matter Experts.
2. But focuses upon tactics:
   - Three comprehensive meeting agendas for every client progress meeting.
   - Checklists for everyone on the team.
   - Documented processes for everything affecting Ideal Clients
   - Full training for every member of the advisor's team (audios, video tutorials, templates, group coaching webinars).

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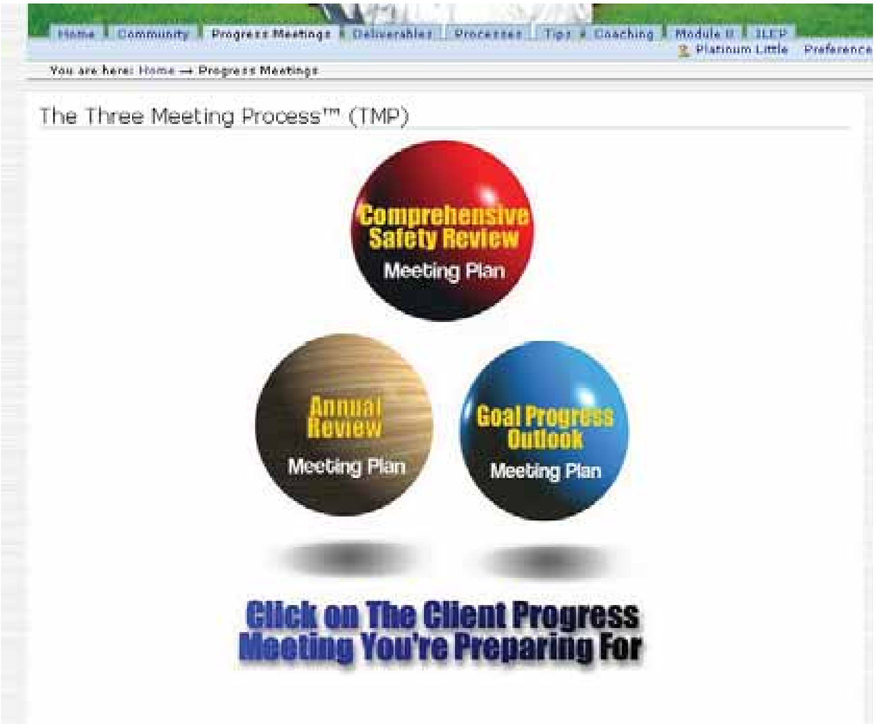
The Trusted Advisor Toolkit™ provides detailed tactics:

1. **Three comprehensive meeting agendas, one for every client progress meeting.**
   - **So that none of the 143 Deliverables Checkpoints™ for an Ideal Client are overlooked annually.**



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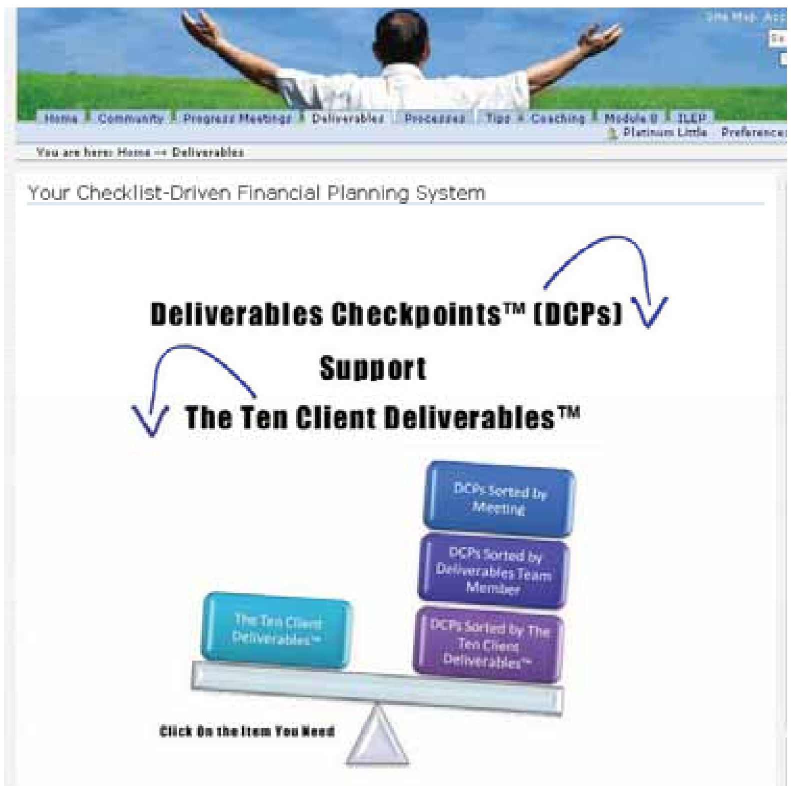
The Trusted Advisor Toolkit™ provides detailed tactics:

2. Checklists for everyone on the team.

- So that everyone on the team clearly understands *their* assigned tasks for every Ideal Client annually.



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The Trusted Advisor Toolkit™ provides detailed tactics:

3. Documented processes for everything affecting Ideal Clients
   - So that every member of the team knows exactly "what to do" and "when to do it."

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The Trusted Advisor Toolkit™ provides detailed tactics:

4. For Every Member of the Advisor's Team: Advice, guidance, full training & support (audios, video tutorials, templates, group coaching webinars).
   - **So that** the advisor can stay focused upon their priorities & doesn't have to spend their time training anyone on their team or holding them accountable.

Who is The **Trusted Advisor** Toolkit™ For?

The Ideal Advisor for The Toolkit **Fits This Profile**:

- ❑ Producing annual revenue (GDC) **in excess of $100,000**,
- ❑ Committed to delivering **fully comprehensive financial services** to all of your Ideal Clients,
- ❑ **Coachable** and willing to accept the advice and guidance of experts,
- ❑ Willing to **build a Deliverables Team of experts** to help deliver comprehensive financial services
- ❑ Has at least **one administrative support person**
- ❑ Likes the idea of having a structured process for delivering a **checklist-driven system** of comprehensive financial services,
- ❑ Is willing to invest **8 hours per week** of the time saved by this system in **Client Acquisition Activities**.

What is the Investment?

For Individual Advisors

- $9,750 one-time up-front fee
- + Monthly Access Fee
  - Currently $175/month

Cancellable anytime

Valid Through Sep 30, 2010

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Reduced Investment For Multiple Advisors

Number of Advisors (From ... To)		Inception Fee Discount	One time fee at inception per advisor	Monthly Inception Fee (16 months / no contract)	Monthly Access Fee per advisor	Monthly Fee first 16 months	Total first year per advisor
1	9		$9,750	$0	$175	$175	$9,925
10	99	10%		$548	$165	$713	$878
100	199	20%		$488	$145	$633	$778
200	499	30%		$427	$135	$562	$697
500	749	40%		$366	$115	$481	$596
750	1000	50%		$305	$100	$405	$505

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