

The Trusted Advisor Toolkit™

TrustedAdvisorToolkit.com

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Bill Bachrach Preferences Log out My Folder

You are here: Home → Are you controlling your business or is your business controlling you?

Owners of Module 8

If you would like your Administrative Mgr (AM) to access the "Module 8 Tab" click here

Get >> Started

Info Welcome back! You are now logged in.

Are you controlling your business or is your business controlling you?

A Toolkit Exclusively for Trusted Financial Advisors to organize your practice around offering fully comprehensive financial services through a Best-in-Class team of Subject Matter Experts

Quick Links For Our Members

TheTrustedAdvisorToolkit.com™ Turn-key Practice Management Operating System

Upcoming Events

- Bi-weekly Group Coaching Webinar #5 Webinar, Jul 01, 2010
- Bi-weekly Group Coaching Webinar #6 Webinar, Jul 15, 2010
- Admin Support & Deliverables Team Group Coaching Webinar Webinar, Jul 21, 2010
- Bi-weekly Group Coaching Webinar #7 Webinar, Jul 29, 2010
- Bi-weekly Group Coaching Webinar - FINAL FOR THIS ROUND Webinar, Aug 12, 2010

All upcoming events...

NEW Toolkit Blog

New Ideas Tools and Resources

BLOG

Step 1: START HERE

Kate Wilson Case-Study
Sign-up for Kate Wilson's Case Study to create step-by-step a plan to launch all the resources here on the site.

Sign up for the video lessons here at no charge

This case-study has three installments which will be emailed to you over the course of the next week at no charge, but you have to sign up to receive this important series of video lessons

[Sign up Now](#)

Here's how to get started now...

There are many tools here for you to use with your clients and to ensure your team knows exactly what to do and when to do it. To get started, it's best if you watch the "Guided Tour" below to get oriented.

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
*indispensable to their clients.***

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.**



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	

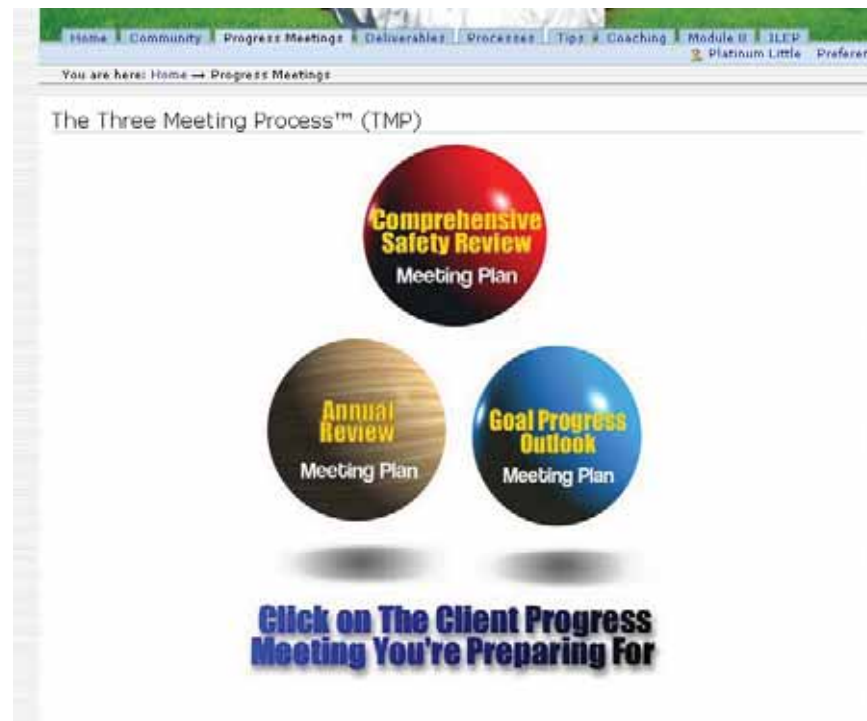
To Get **More Referrals** You Have To Be **More Referable...**

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).



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.

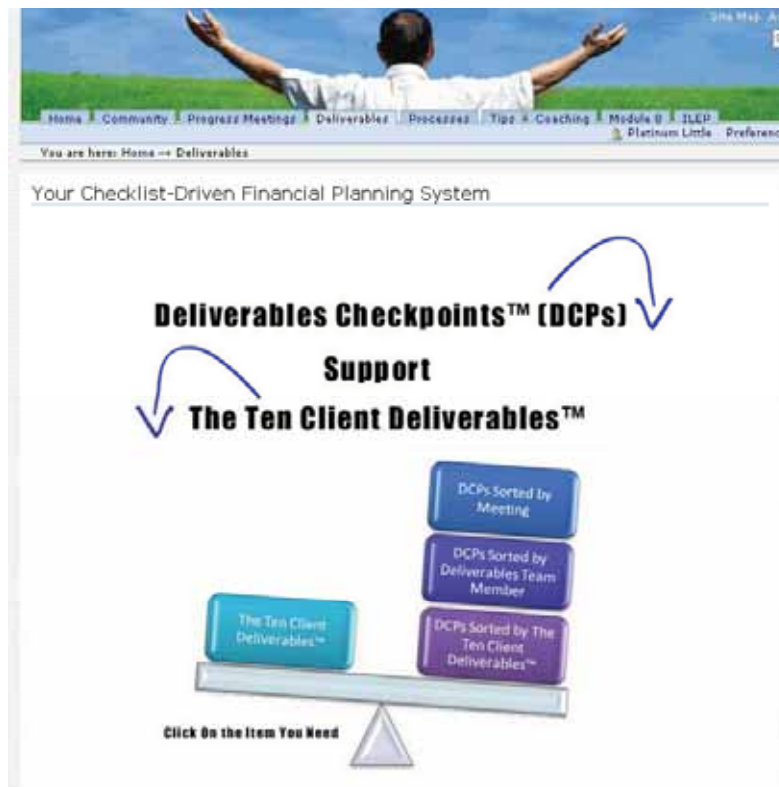


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The Trusted Advisor Toolkit™ provides detailed **tactics**:

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.

The screenshot displays the user interface of the Trusted Advisor Toolkit. At the top, there is a navigation menu with links for Home, Community, Progress Tracking, Call Center Tools, Resources, Tools, Coaching, Profile & LEP, and a search bar. Below the menu, a banner image shows a person with arms raised in a field. The main content area features a heading "Follow these steps - If you're new to the system here is your pathway" and a sub-heading "Here is a path to follow in implementing the content here in The TrustedAdvisorToolkit.com™ (TATK) turn-key practice management operating system." Three numbered steps are highlighted in boxes: 1. "New to System? Here's your Path" (with a pen icon), 2. "Practice Management Assessment" (with a smartphone icon), and 3. "Your 16 Month Plan" (with a large number 2 icon). Below the second step, there is a note: "ATTENTION GROUP COACHING MEMBERS: Check Month Page for 'Group Coaching Call' Schedule". The sidebar on the right contains "Upcoming Events" with a list of webinars including "Bi-weekly Group Coaching Webinar - FINAL FOR THIS ROUND" (Aug 12, 2010), "Admin Support & Deliverables Team Group Coaching Webinar" (Aug 16, 2010), "Bi-weekly Group Coaching Webinar #1" (Sep 02, 2010), "Bi-weekly Group Coaching Webinar #2" (Sep 16, 2010), and "Admin Support & Deliverables Team Group Coaching Webinar" (Sep 22, 2010). At the bottom of the sidebar is a "NEW Toolkit Blog" section with a "New Ideas, Tools and Resources" header and a "BLOG" button.

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**.

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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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