

Advisor Network Exclusive Coaching Program

Open to FSC, Royal Alliance & SagePoint Advisors

**ARE YOU READY TO FEEL EXCITED
ABOUT THE FUTURE OF YOUR BUSINESS?**

Over the past five years, the
**Advisor Network
Exclusive Coaching Program**
has helped create many of the
strongest producers by showing them
how to simplify and systematize their
businesses and their lives.



Tom Gau, CPA, CFP
Ken Unger, President
Million Dollar Producer, Inc.

The **Advisor Network
Exclusive Coaching Program**
has also transformed many of our
participants into million dollar
producers that primarily
generate fee-based income.

Starts January 2011!

For more information,
call **Million Dollar Producer** at **(866) 866-0472**

The Advisor Network Exclusive Coaching Program is geared toward advisors that are looking to build or secure practices that offer the highest level of financial advice and service for clients and prospects.

This program helps advisors build upon strong principals of financial planning and service to produce extraordinary results. It focuses on the core values of providing the highest level of financial advice and service while maintaining an optimum benchmark of efficiency for their financial practice.

This program covers all of the areas that a high-level financial planning practice needs to be successful.

The **Advisor Network Exclusive Coaching Program** trains advisors on how to build a strong and lasting high-level financial planning practice that is primarily fee-based. Over the course of one year, all advisors in this program will see how multi-million dollar practices in our business operate in an environment that:

- Converts existing assets to fee-based accounts
- Attracts a steady flow of “qualified” clients and assets
- Provides a high level of value to retain existing clients & attract a pipeline of “qualified” prospects
- Establishes a system of respect through an effective interviewing and client meeting process
- Has a system for all office procedures and marketing functions
- Has a customized, meaningful, 12-month marketing calendar
- Communicates effectively with existing clients and prospects
- Compliantly services all fee-based accounts at a very high level
- Keeps you current on all tax and estate planning issues

Which advisors are best suited for this program?

The **Advisor Network Exclusive Coaching Program** is for producers who want current strategies and results. The systems and information are not just results of surveys or great thought. They are proven techniques and strategies that are currently working for financial advisors who run multi-million dollar practices. **This program is best suited for financial advisors that:**

- Generate between \$200,000 and \$1,000,000 of GDC
- Have an interest in building a strong fee-based business
- Have at least 1 dedicated staff person
- Have a positive attitude!

Program Topics

Over the one full year timeframe, we will focus on all aspects of running a highly-successful practice. Here are 18 of the areas we review in which advisors can maximize their success.

- **Marketing**
- **Office Structure**
- **Client Interview System**
- **Goal Setting**
- **Developing a Business Plan**
- **Building a Powerful Fee-based Business**
- **Investment Selection Process**
- **Time Management**
- **Networking Systems**
- **Wealth Protection Techniques**
- **Tax Planning Techniques**
- **Estate Planning Techniques**
- **Client Service**
- **Client Review Process**
- **Hiring & Maintaining Competent Staff**
- **Running a Healthy & Profitable Business**
- **Compliance**
- **Retirement-Income Planning**

Program Benefits

The Advisor Network Exclusive Coaching provides you with the opportunity to participate and work with both Million Dollar Producer, Inc. (the leading training firm in our industry for high level practices) and other successful financial advisors. The program features a menu of benefits that include:

- **3 Two-day Meetings**
- **4 Conference Calls**
- **Quarterly One-on-One Personal Telephone Coaching Sessions**
- **12 months of membership to www.MDPRODUCER.com**
- **Newsletters, letters and meaningful reports to solidify client relationships and generate qualified prospects**
- **Case Study Access to Tom Gau**
- **A Complete Manual for Success**
- **A Customized 12-month Marketing Calendar of Meaningful Activity**
- **Regular Follow-up from Million Dollar Producer**
- **Heavily subsidized by your broker-dealer. Call for details!**



Your Coaches

Tom Gau, CPA, CFP and Ken Unger, President Million Dollar Producer

Tom Gau is an active CFP who has produced over \$1,000,000 annually for the past 20+ years. **Ken Unger**, a 28-year veteran, is one of the industry's most respected and experienced coach and trainer of high-level producers. Tom has won numerous accolades available to financial advisors. Ken is consistently hired by major firms to train their top producers.

Over the last six years, several hundred of our top advisors have participated in this program.

Learn what the top producers are doing to reach even higher levels!

All participants in the program have:

- **Businesses that are substantially “fee-based”**
- **A service model for high-level clients**
- **Predictable streams of future revenue**
- **Strong infrastructures and systems**
- **Practices with real value**
- **More enjoyable business and personal lives**

Here are what a few Exclusive Coaching Program participants had to say:



“As highly successful financial advisors and long time Royal Alliance associates, we are always interested in programs and systems that can improve and grow our practices. Since joining this coaching program in 2008 our practices have become more efficient, we have attracted more assets, and our referral flow is skyrocketing. The personal time Tom and Ken give to our practice and the compliance-approved materials they provide us, have made an immediate impact on our business. We are surprised that every successful Royal Alliance advisor is not participating.” **Howard and Ira Materetsky**



“The Exclusive Coaching Program’s ROI is incalculable. This program has helped me with so many nuances of my practice I can’t truly put a value on it. I have attracted more clients that I know I would not have gotten without this coaching program, but the bigger value involves all the small improvements that have led to my 146% increase in production and 1,000% more fun! This program is the most efficient way to streamline your operations and achieve more success.” **Pam Dumonceau, Denver, CO**



“I was stuck on a plateau. I knew I had the skills, knowledge and abilities to be a much larger producer. My results are impressive in that I have gone from \$240,000 to over \$900,000 in production. Better yet, with my new fee-based system in place and my service model and marketing plan fully designed and supported by Tom and Ken, this year I expect to hit the million dollar mark. I am surprised every producer in the firm isn’t taking advantage of this program.” **Don Clark, Overland Park, KS**

“As a top producer, I am always looking for additional ways to protect and grow my business. Especially in the last couple of years, I have found that taking my business to new levels and adding new, qualified clients is even more essential. After being in the Exclusive Coaching Program with Million Dollar Producer for the last two years, I can clearly say that this is the best program for a high level producer to protect their business and attract new, qualified clients. They provide all the marketing and support I need to efficiently grow my business. Their help in reviewing tax forms and estate planning, areas that I already have expertise in, is exceptional. Tom Gau, Ken Unger and their extremely supportive staff are very generous with their time. I plan on making this an annual investment in my business. I highly recommend the Exclusive Coaching Program to all who are looking to attain or maintain the million dollar status.” **Rich Graham, IN**

