



## **THE ELITE WEALTH MANAGER**

BUILD A SIMPLE AND ELEGANT WEALTH MANAGEMENT BUSINESS

# **WELCOME TO THE ELITE WEALTH MANAGER ACTION PLANS**

# VIDEO TRANSCRIPTION

**John Bowen:** Well, if we're going to get results in Elite Wealth Manager and CEG is all about results, then we need action plans. I'm John Bowen, CEO, and founder of CEG Worldwide and let's get started on these action plans.

How are we going to do this? Well we've got a lot of tools here set up for you. See action plans, they're designed to help you with the specific steps that you need toward achieving your goals and are very much an important part of the Elite Wealth Manager.

Your coaches will work with you to help you really stay on track, but you've got to use these to keep yourself on track and then share that progress with a coach. Now what we have is we have templates for you for the three action plans and you can customize these.

These are ones that have been helpful for your peers that have gone before you and you can customize it in any way that you'd like. You're going to find there's all kinds of tools for implementing all nine Elite Wealth Manager strategies as we go around.

The key remember is we're clarity of intention, world-class client experience, wealthy client pipeline and these are the nine accelerators. CEG we've designed strategies for each and every one so we can turn them all green so you can be that elite wealth manager and race up the hierarchy of advisor success. That's what it's all about.

So, let's continue here. What do we have for you? So, remember all the tools are going to be in the strategy, for each of the strategies are in the second module, which will be the tool section.

Now we also make them available in one downloadable tool. So, if you want to save everything, have it available in a file or download it for long-term convenience, just go ahead and do that. We want to make this really easy for you.

In addition, what we have is the Elite Wealth Manager Action Plan. Now this is an Excel spreadsheet that you can download, and I'm going to go ahead and download it and show you it. It's a really great piece because what it does is it inventories all the modules that we have and allows you to put together a timeline for yourself and then share that with your coach.

So, let me just bring that over into the screen that I have. I'm filming and you can see strategy. Put your name in there, strategies one, two and three are color coded, black, blue, and green. It has all the different actions and the things that we're looking for you to do. Remember, you've got the whole program to do this. Now you can customize it along the way.

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What we're looking for is who's responsible, in most of these it's going to be you. The completion target date, when are you saying you're going to get it done and the date completed. You can design more information into it as well.

Okay. In addition, we also have the Business Development Matrix. This is a great tool as you move through and really head over, and let me do that, to the wealthy client pipeline. When we look at the accelerators, the talented experts, the economic glue, and the best client partnership, what we're looking to do is we're looking to build some sizable significant business development.

The key, and I always like this, is we want to move from being concerned where that next client is coming from to going ahead and having the quiet confidence that they're going to be here because of what you're doing. I mean, you've got some tremendous ability to make a difference.

Now the way this comes out of some work where I work with the Elite Wealth Managers. So, let me just blow this up a little bit so it's a little easier to see. Actually, I guess let's blow it up here a couple of ways. Page with here.

Think of this business development matrix and I always think a short term is under six months. Medium term six to 18 months and long-term 18 months. I'm always interested in getting some early wins. So, I start, and you're going to hear us talk about this, is working with clients, occurring clients. Say, where's the win? Well we can increase wallet share by serving them well. So many clients, affluent clients, diversify by advisors.

So, our ability to go back and do second opinions with them, rediscovery meetings, capturing the assets, doing an analysis, you'll see all kinds of different ways that we're doing it as you go through the modules. Same with prospective clients. What we want to do is we want to have a steady stream of prospective clients coming to us.

Second, opinion is going to be the biggest opportunity to really referrals and introductions through the second opinion. These are all going to come to you. Then later on you're going to do some group presentations with the elite wealth planning book. I mean it's an amazing tool that you can use in the presentations that go with it to really accelerate your success.

I always like marketing one-to-one, but I like one to many is even better. The best part and you're going to learn about it more are that centers of influence, particularly accountants and attorneys, there's a lot of opportunities here and what are the opportunities? Well, the opportunities are that in every one of our survey of affluent clients, we consistently find that over

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half of them found their primary financial advisor, you, your peers through an introduction by an accountant or attorney.

So, if we're going to be successful on purpose, let's really make sure that happens, and that's what we're doing in the wealthy client pipeline. The other thing that is really powerful as you're doing that and putting it together is remember when we survey the top advisors, we ask them where they got their five best clients. Super majority tell us all the time they've got them from introductions from accountants and attorneys.

So as we're putting together our plan, one of the things we want to do, and you'll hear us talk about that as we go through the wealthy client pipeline is to make sure that we're really thinking through each of these areas and the short term, medium term and long term, working with our coach. So, we stay focused. We don't take on too much.

The temptation is to try to do everything in a business development, just a few things and look out. You're going to find yourself accelerating your success tremendously. Going up the hierarchy of advisor success and making a huge difference in your client's life and building an amazing life of significance in yours. Really looking forward to working with you. I'll see you in the next video.