



**CAPTURING THE POTENTIAL**  
**YOUR WEALTH MANAGEMENT ROAD MAP**

**SEIZE THE OPPORTUNITY:  
TO SERVE YOUR CLIENTS RIGHT NOW**  
OVERVIEW

# VIDEO TRANSCRIPTION

**John J. Bowen:** Let's go ahead and examine our first module, seize the opportunity. Really seize the opportunity to serve your clients, your prospective clients, and work well right now with other professionals.

We'll dive into the overview, and then I'm going to point out the three things that you must know now with this new world, the difference that we have. And then the three things you've got to do. That remember tactically we've got to implement.

So, as we go into the overview, what you're going to see is that we recognize it's an extremely challenging time right now. My hope is that everyone you love and care about is safe, and this is a terrible time. Way too many deaths in a single death is none of us want, but we're being asked to rise to the occasion. All of us got punched in the mouth.

I always think of Mike Tyson's quote, very few things of quotes of Mike Tyson do I, I think are important, but the one that, "Everybody has a plan until they get punched in the mouth." This was a period where many of us, if not all of us really felt lost at least initially.

And then as we were able to synthesize and pull this together and create framework around it, we're now being asked to be leaders, and there's an opportunity for us to provide that leadership and really have tremendous success in doing it.

So, I want you to think about with this unprecedented environment, it offers unprecedented opportunities. And if we have to rise to the occasion, take care of our clients and the prospective clients and people who said not now to us, who we can rescue and actually grow the business even more and be positioned not only now, but through this as things we go to the new normal to really grow.

But there is a big sense of urgency I want you to have and I'm going to show you why using my whiteboard here. Don't worry, I'm not going to use whiteboard. I'm not the greatest. It's like a flip chart if you will. But I want to share with you what we're seeing.

If you think of when did, we get punched in the mouth and we start that as the origin there. And then we look, and we say, "Okay, what's happened since then?" Well, we've had a downturn, and if this is a classic U-shape, the opportunity for growth is really when we get back up above the line, many of us think.

But I look at it that what we've had is this crisis. And at the time of the recording, I'm hoping we're somewhere around here, and there's not a double death.

# VIDEO TRANSCRIPTION

None of us know how this is all going to turn out. And we've got to have expectations for the worst, hope for the best, expect the worst, and prepare our clients or prospective clients, so the people we work with together.

But I want you to be thinking about the opportunity, and I call it the opportunity zone here. And if we look at this area here, most advisors are waiting. Say we got lulled into a sense from 2009 to the pandemic, what happened? The market was almost straight up, huge gains.

And what we have here is that now everybody got punched at the mouth and different levels of risings getting up, and by jumping in now before the full recovery, taking advantage of this opportunity zone, you're going to be well positioned, not only to grow now.

But to really grow and create that elite wealth manager position and to us an elite wealth manager is somebody who's consistently making a million dollars a year net income and serving their clients well.

So, what we want to just think you can wait like everybody else until everything's clear. The vast majority of people, we can dive in now capturing the potentials all about diving in now. So, let's go ahead and do that.

The times demand it to act immediately to provide leadership and support your clients. We're going to talk about how we build that world-class client experience. So not only supporting them, but so that they want to introduce you to people they care about. They want to give any assets that are away from you and other services you can provide. They want to come to you.

In addition, prospective clients, you have a chance. Those people who said no to you or ghost you, even worse came in for a meeting. You have the ability to reach out to them and make a huge impact and rescue them from the poor service they're getting today and probably poor advice.

But we've got to move right now. So, we call it seizing the opportunity to serve and doing it well. So where are we going to go? Well, join me in the next video. Let me just pull that up here. And what we're going to do is we're going to go into the three things you must know right now so that you can make a big impact. I'll see you there.