



## **THE ELITE WEALTH MANAGER**

BUILD A SIMPLE AND ELEGANT WEALTH MANAGEMENT BUSINESS

**BECOME THE EXPERT  
THE WEALTHY WANT  
DISTRIBUTE THE FLASH REPORT**

# VIDEO TRANSCRIPTION

**John Bowen:** If you're ready to become the expert your clients want, then you're ready to begin laying the foundation by distributing the flash report. This is such a great tool and we've made it so easy for you to do. So, let's talk about how you're going to do it.

So, as we come down here, as a participant in the Elite Wealth Manager, you receive a complimentary membership in CEG Advantage. And this would be for a full year beginning your first session with the Elite Wealth Manager. So, we don't turn it on when... if you come in, and everybody comes in a little bit before the first session, we don't turn it on because we want you to remember what's so important. Let me clear up my marketing. Well, actually I'll leave the white lines from the last time I drew it here.

What we have here, oops, let me put it back up. There we go. Is a clarity of intent and world-class client experience. It takes a little while to get these in place. And the temptation everybody has is to get started on the world class delivering, actually putting the marketing in place, the wealthy client pipeline. So, we want to get you positioned well first so that you can really bring the clients in. We've had a number of coaching clients who had great marketing machines before they came in, but they were converting very few prospective, particularly high level, prospective clients to engaged clients.

And one of the campaigns we've done is gone back to them with the thought leadership prospective, clients who got away. And that became very valuable because with a little contact we've had as high as in the 30% range of people who have previous said no to you coming in. Now I would expect somewhere around 10% would be average. But we've had advisors have some blowout success. But anyways, let's go and really look at this. What we're seeing is you have this program, it's fully there for you. This is our turnkey business development program. We have spent millions of dollars developing this.

We just saw so often that, so few advisors were doing it. And we saw how much Ross and I and when we do research on going up the hierarchy to the very top of the elite, almost always they're perceived as a thought leader. And they're creating some amazing leadership. So, we said, "Why don't we do it for you?" And that's what we've done here. So, let me give you the example. The very first part is a key part that we give you is what we call the flash report. This is a monthly, it's a two-page article on a topic of broad interest to affluent individuals and families. It could be health care, estate planning, really anything that we find interesting for them. And what we suggest to you, recommend strongly I think would be a better word, is that you begin distributing to your top clients, prospective clients, professional advisors, and quite honestly, unless you've gone after the very low end of the mass affluent, I would do it to all your clients.

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The incremental costs of doing it is, particularly if you're doing it digitally, recommend distributing it initially digitally because it's easy to do. Now as you start having success, I'm going to encourage you to go to print. Why? Digital, even if you have a great relationship with your clients, it's not going to be 100% opening. The same with prospective clients. It's going to be way down their COIs. Once you go to print almost everybody opens up the envelopes. Now they might open it up by a garbage can and shoot it out right away. And this is why it's so important to have a great look and feel.

As you look at our flash report, it doesn't do it justice on camera here, but it's a very high-quality piece. And let me grab actually, I think I have a sample here. Yeah, I have some samples behind me, so I'm going to grab those. And let's see, do I have, yeah. Okay, I happen to have one here. And this is, let me go full camera. I might just hold it up. You can see its heavy paper. It's branded with our VFO, virtual family office inner circle flash report. Think of as we go up higher levels, we're really looking that we can create a virtual family office. A little complicated on all the single-family offices, typically about 150 million or more of net worth. But you hire your own employees. Typically, it starts with hiring a partner out of an accounting firm, general counsel maybe, your own investment at least consultants if not managers, depending on the scale of your wealth, and then other specialties that you need.

So, we study them and bring that down to our content, as I mentioned before. And this is a piece, you can see it's our branding. Now one of the things that we suggest is you take this and make it your branding. Let me go back in here. I think it says it here somewhere. So, first of all, the big thing is a multiplier effect, and we'll talk about that a little bit more. But by getting out there to your top clients, your prospective clients and professional advisors and community, people know you. And I always think of it a little bit like strategic stumbling. As people know that you're the expert and they go, "What about working with John?" And that works extremely well, much better than you think it will.

Now the key is you got to do it consistently and get on the radar screen. Also, we're going to share with you in strategy eight, the next strategy. So, as we go, we're going to go to economic glue. In economic glue what happens is the thought leadership becomes a big part of the economic glue that you can deliver. But one of the things that we have to do is we have to do it first so that we can provide the guidance so that when we work with COIs, they can do it too. So, this is why we recommend getting it out to everybody right away. And you'll find the flash report is made available. You'll get it, you get a black envelope. I don't have one handy here, but you'll get a whole bunch of content, the VFO inner circle, a book with special reports each month, and they're all available digitally for you as well. And we allow you to customize the flash report with your look and feel totally.

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So, one of the challenges for all of us is creating this thought leadership with our look and feel that we can get out. Now you have to give us attribution, but again that's fine. It's in the fine print at the bottom and we show you exactly how to do that. And you can do it with your own branding. I'd recommend strongly you do that if you can. We give you the Word version, our graphic files, the suggested cover letter or email that you would send out to all your clients, prospective clients and COIs, and then we send you a letter giving you the authority so you have our permission to use it. Plus, we also give you the FINRA letter as well that we received from FINRA on their review. And then on how you can modify it.

And all you have to do is you can click here and that's going to take you to CEG Advantage. And watch the welcome video. I was thinking well I'll go give a demo of the whole program. We have the whole program all laid out so well there. All you have to do is click on it now. Now, okay, you've got the first thought leadership piece going. Where are we? Well, where we are is we saw the power of curating versus creating, we really want to bridge, we know why we want to be a thought leader, we know that we want to cross that gap, bridge that gap, from being a hidden talent to a talented expert so we're the go to advisor. We now know curating, how powerful it is, so that we can have a consistent flow of thought leadership. And we now know what the flash report is and how we can use it by going to the CEG Advantage platform.

So, the other thing that I want to do is just share with you a higher level. This is going out to everyone. The VFO inner circle are, think of them as kind of mini white papers that you can co-brand with us and get out and use in special situations for your clients, your prospective clients, and your centers of influence. Unbelievable value that really, I'm proud of our team for what we're putting together. And I'm even more proud of the results that our coaching clients are getting with us. This is going to make a big difference. As we race up, we're going to make a huge difference and it's not only going to position you as a talented expert type where we are really making progress there, but it also provides you the economic glue to play well with centers of influence. So, we're making a lot of progress. So, go ahead and join me in the next video where I'm going to go over these VFO, virtual family office, inner circle special reports. I'll see you there.