ceg worldwide LLC

THE ELITE WEALTH MANAGER

BUILD A SIMPLE AND ELEGANT WEALTH MANAGEMENT BUSINESS

IMPLEMENT WEALTH MANAGEMENT

OVERVIEW

VIDEO TRANSCRIPTION

John Bowen: Strategy two Implement Wealth Management.

This is a really important foundational section for you. And the overview is pretty short. You can see the text here. There's not much, but the idea is, the key idea, is gaining clarity about your practice so you can be extremely clear about the business model. So, going back to the hierarchy, we can see the second area, second accelerator, as we look at the clarity of intent, is this whole business model, very top. And we've got to get clear on what it is and how that works. So, the aim of the elite wealth manager is making it clear to you that wealth management business model is the elite level.

And as we set the stage, we're going to explore some of the aspects where the wealth is, high net worth, and matter of fact, rather than reading that, I might just show you, here's where you're going to get the tools. So, whenever we have tools, each section will have it as a second one after the overview. But I'm going to walk you through in the subsequent videos, the affluent market. There is so much wealth out there, it's amazing. So never been a better time to move up market.

Nine high net worth personalities. This is all about the psychographics. Most of us are pretty familiar with demographics, but we need to understand the psychographics because the affluent want to connect with us emotionally first, and then justify engaging us through logic. So often we try to do it in logic alone.

I've already talked about the big five. I call it the five key concerns of the affluent. This is something so important for you to understand. This would be one of the few things we're going to say, you got to memorize it. Second is the six C's of client loyalty. This is another one I'd like to have you memorize because as you put together any of your business development and client experiences systems, you're going to always go back to these six C's. And from there we're going to go over the four business models. There are four, but why you should be going and taking wealth management as the right one.

And then lastly, I'm going to show you a formula. I'm going to draw it out for you, and it's really powerful. It's raised billions of dollars. You're going to be using it with prospective clients, clients, and centers of influence. So, you'll want to see this, as well.

So please join me in the next video where we're going to go ahead and I'm going to share with you our understanding of the affluent, the affluent opportunity that you have today. I'll see you there.