



TOTAL CLIENT MODEL
WIN AFFLUENT CLIENTS FOR LIFE

YOUR OPPORTUNITY AWAITS
THE TRANSFORMATIVE POTENTIAL
OF THE TOTAL CLIENT MODEL

VIDEO TRANSCRIPTION

John Bowen: The transformative potential of the total client model. I got to tell you, in our coaching programs, we've been using this since the early 2000s, and it really came from the family office, the super-rich. Families now with over \$500 million in net worth. We shone our research in that space that they were using this technique to really get a great understanding of their families. Well, by doing that, that has the ability, by bringing it into your practice, that has the ability to transform your practice.

Let me share with you what we're talking about here. I mean, this is one that if you ask anyone that's gone through our coaching programs and has implemented, executed this well, this has changed their practice totally. It's helped them differentiate themselves dramatically and so much more. Let's take a look at what happens. Remember, there's going to be no shortage of competition, particularly as you move up market, and what we want you to do is gain an advantage.

One of the single most effective ways you can do it is to get a great understanding of your clients by using this total client model. This has been very effective in helping. I mean, this is a key. It's going to help you facilitate the wellbeing of wealthy clients. It's going to do it in a lot of different ways, and you'll see it as we go through this program. But it's also going to help you dramatically boost your success. I know sometimes it's like how could that happen? Well, it will happen and this is where you we'll go into how you can do, use it with your current clients and your future clients, and with your COI; centers of influence, the accountants and attorneys they're going to want to have you do it for their clients. I mean, there's so much opportunity here. That's why we're going to spend the time to make sure you're able to do it well.

Advisors who've committed to learning and applying this have, first of all, extremely loyal clientele, and the practice are much more successful than their peers. This is where, when retention in our industry hasn't been a huge issue, if you do a reasonable job with clients' experience. What we're seeing, particularly as you go up market, clients are becoming much more concerned, not so much on the investment side, they really think that's kind of table stakes as they go up higher, as you go up higher in the wealth. Whether it's at \$1 million minimum or \$5 million. As you go higher and higher up to \$25 million of investible assets, what happens is the number one concern is still making smart decisions about their money, the investment side. But what's happening is they want advice beyond simply investing because the internet, the technology has just gotten so good, the robo advisors, and so many advisors are good at this, they can't tell the difference. They want your help going and addressing their higher-level concerns.

VIDEO TRANSCRIPTION

Well, here's the challenge. If you don't understand them well, you're not going to be able to do it. But if they believe you understand them, and obviously it's better if you do, and that's where the total client model really comes in. It's going to help you be dramatically more successful because of the retention. Also the ability to go ahead and really go and build your personal wealth, because the clients are going to want to go ahead, and not only stay with you, but give you a larger wallet share of their assets, and then introduce you to the people they care about so that you're growing your business.

Okay. This has got to become an integral part of your business, and it's going to help them really connect. What we want to do in this is, in transforming the idea is it's going to allow you to scale up. For some of you, you have a lifestyle. You're the only advisor, okay. And you've got a team around you, both internal and external. You know, employees outsource. Some of you want to build a national enterprise, whatever it is. This is a very, very scalable, powerful model that's going to provide you a lot.

You know what the challenge is? We've got to move. We've got to bridge the gap from knowing and doing. What we want to do is we want to get you to have a serious commitment to learning this process and use it unflinching, and we're going to guide you every step of the way. It's going to be really straightforward how you do this, and if you think about it, as you get a deep relationship with a client so that they understand that you get them and you get so good at this, what happens is new people coming in, this is a differentiation, it's not the investments, it's not all the wealth planning you can do, this is it. Now you got still be able to do those other things well, but this will differentiate you.

In addition, the total client model, the profile that you gather, you can use to work with your professional team, the CPAs, the accountants, the attorneys, the insurance specialists, all these different people. What happens is in a minute, no more than five minutes depending on the complexity, you can share the insights and get the recommendations, and what will ultimately happen as you get good, both your clients and your COI; centers of influence will want to have you do it on the people they care about. Let's get started.