



TOTAL CLIENT MODEL
WIN AFFLUENT CLIENTS FOR LIFE

THE EASIEST PATH FORWARD
CAPTURE MORE ASSETS

VIDEO TRANSCRIPTION

John Bowen: Making it real. Capturing substantial amount of assets by serving your clients well, you get to do well. That's why I love this business. Capitalism works. But how do we do this? Well, let me just make it real easy. This is a very short video because it's very easy to do.

I've gone ahead and asked you to do total client profile on 20 of your affluent clients. When you do that, based on the evaluation, you're going to identify a number of affluent clients who have a portion of their investment assets with other advisors. Okay, it's very likely. Now, you may be the one advisor that has all of the assets of everything, but what we find often, particularly as you're going up market, I've shared the research with you a few times now, and because you've got a great relationship with them, you get to skip step one of the asset capture process. You already got it.

However, you need to determine the most appropriate asset transfer opportunities. Using the high net worth psychology, you've got to understand, you have done the discovery, total client profile, the rediscovery process. You now know what their high net worth personality is, you know what assets they have away from you. Coupled with this, you can write down and describe an opening to asking for more assets. And you know, I've done that on the last segment, so you can make it really easy.

Now, one of the things I want you to do is you can use our scripting. Just modify it and so on. We certainly don't anticipate that conversation is going to be perfect. And whatever you write out, you're going to do it verbatim. They haven't read their parts, and they're not going to do it.

What happens is you're going to adjust to the real world as you're talking. But by writing it down first, you're going to get so much better. By repeatedly working on this asset, capture process, you're going to become really proficient, and it's going to translate into amazing, amazing success. You're going to get great at doing the total client model. You're going to have this early wins of your existing clients, and capturing more assets, being able to provide additional services of what you offer. Then you're going to get that quiet confidence, so that as new perspective clients come in and you do the discovery meeting using the total client model, they're going to have tremendous confidence in you. Okay. Where do we go from here? Well I want to walk you through the very last module where success is in your hand and it's time to implement. I'll see you in that video.