



**TOTAL CLIENT MODEL**  
WIN AFFLUENT CLIENTS FOR LIFE

**SUCCESS IS IN YOUR HANDS**  
IT'S TIME TO IMPLEMENT

# VIDEO TRANSCRIPTION

**John Bowen:** Success is in your hands. It's time to implement. I got to tell you, the biggest risks that you have with the Total Client Model is you. And I don't mean to be that harsh, but it is. There are execution risks. We're so busy doing it, doing it, doing it in life and in our business that we don't implement what we know works really well, and I got to tell you, that would be the biggest mistake that you ever make. This, delivering a world-class kind of experience, nailing that experience for your clients, perspective clients, and the relationships you build with COIs, the accountants, attorneys, and other professionals. It's critical to be really good at the total client model, so it's time to implement. It's time to make this stuff happen. You have one of the most powerful business processes ever developed. Remember, it came from family offices, the super-rich 500 million or more, and we brought it down for you to use with clients.

Really, typically, for the most part, a million or more of investible assets. Now, you can go lower than that, but really, that's where it becomes a great return on investment for you, and you can do a great job for them. Now, the heart of the Total Client Model is, it's all about them. It's client centeredness. The soul, though, and this is so important, is the professional integrity. And the essence of this is that you're going to provide, and I love this, you're going to take great care of your clients and provide better solutions for them, even better solutions for your affluent clients. And if you work at it, you're going to have incredible success. So how do you do it? Well, you can build a high net worth practice where you're going to have a solid cohort. I mean, very loyal, wealthy clients who want to play with you. And the means to expand this and then to have consider economic success for your practice, and astonishing personal wealth.

I mean, we get to do well by doing well by our clients. I mean, this is where the magic happens. This is capitalism. We're in financial service. You're in one of the most profitable businesses, when you do it right. This is the toughest business in the world when you don't do it right, but once you get those systems and processes in place, and this is one of the most core of all, but it doesn't happen, here's what you need to do to excel. Very first thing is be committed to the wellbeing of your clients, okay? This is absolutely fundamental. This is all about taking better care of the clients. You have to be empathetic; you have to care. You have to be curious on how you can really get a better understanding of them to serve them well. You have to own the process.

It's not our process. This is your process. These are your clients, and by using this, you can get clarity on how to serve them and help them achieve all that's important. The people they love, take care of the people they love, the causes they care about. Make a difference in the world. This is where you really make a difference in the world. You have to gather the information. You've got to use the Total Client Model. This is a skill set that's going to take a little time to get really comfortable. You don't have to be perfect in the beginning. You will never be perfect. I'm learning all the time, and I've been doing this for decades. You will be surprised along the way.

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This is not an interrogation. You have some fun. Have that curiosity. You know that each client, each perspective client, you're going to be able to help tremendously by providing the information, and if you're not the right one, remember we only take clients that we make a big impact with, if you're not the right one, point them in the right direction.

You can add tremendous value. Access required specialist. See, one of the things I talked about early is that clients want to go provide, they really want advice beyond simply investing, and you can't be the expert. Nobody can be the expert on everything. So, build these relationships if you want help, we have programs to do that. This one, we didn't have enough time to go in all of this. I mean, we have a year-long program, but building professional networks with accountants, attorneys, the insurance specialists. I mean, it's amazing. When we do surveys of financial advisors, how did you find your best client? Not the most. Most clients come through referrals, and that's what you're, by delivering this great experience, you're going to get a lot of client opportunities. The best? They come through introductions through centers of influence.

This is where learning how to play really nicely with them and having them provide the expertise, not you, to solve those wealth planning issues, not the investment side, but mitigating taxes, taking care of the heirs, protecting assets from being unjustly taken through litigation, divorce, chair appointing. You make a huge difference with the clients, have a great quality of life, and build your business through the introductions of COIs. Strategically think through each affluent client's situation. You've now got the total client profile. Go through and use a process that I gave you to really identify what are the solutions and how you're going to most effectively communicate it so that you can inspire them to action, so they make smart decisions about their money to maximize the probability of achieving all that's important to them.

Go to work. This is the most important at all. If you've made it this far, and don't go to work, you've wasted a lot of time and energy. If you implement this, you execute this, even imperfectly in the beginning, but go as close as you can to what I've said for at least 90 days, and then you'll get the market feedback and you will be outstanding and you're going to have huge, huge success. See, your success comes from implementing. Success is 1% information, and that's really my role in our team, is that we've provided that. 99% of that success is implementation. The brilliance of the Total Client Model will fade away very quickly if you fail to implement it. We encourage you to go out and seize the moment. Go out and make a difference. Take care of your clients, your prospective clients, and build those great relationships. COIs, they're counting on you. Don't let them down. We wish you the best of success.