



## **THE ELITE WEALTH MANAGER**

BUILD A SIMPLE AND ELEGANT WEALTH MANAGEMENT BUSINESS

# **FORM PROFITABLE STRATEGIC PARTNERSHIPS**

**YOUR NEXT STEPS**

# VIDEO TRANSCRIPTION

**John Bowen:** I'm excited to be the first one to congratulate you on the progress you're making and making it through all nine strategies of the Elite Wealth Manager. Wow. I'm John Bowen, and by now I'm sure you know, CEO and founder of CEG Worldwide. And wow, you've made a commitment to really accelerating your success and you're now ready for the next step.

But before we go there, let's go ahead and take a look at the progress, where we started and where we are now, and more importantly, where we want to go. So, if we look at your next steps here, what do we have? Well again, congratulations, a big congratulations. This is a lot of work, putting this all together, putting the energy in, the time, energy, and money to make a difference for your current clients, your future clients and all those centers of influence you're going to be working with. And you have completely, you've gone through all ... If you're here you should have gone through all nine strategies of the Elite Wealth Manager and you are really on the way of building and having that simple and elegant wealth management practice that, what I love, allows you to have an amazing life of significance.

See here at CEG, we're all about helping you, partnering with you to accelerate your success even more, and then helping you build that amazing life of significance. And you can see over on the right-hand side here, we've got the models and I'm going to go to the full, blow out ones here that I've been showing all throughout. And no matter where you were, whether you were a technician, an experimenter, a Rainmaker, or already an elite wealth manager, we all want to race to the top and stay there so we can build a life that really has ... Leading a life, an amazing life of significance. And that's where it all comes together. And if you reflect back on the beginning when we walk through the three drivers, clarity of intent, world-class client experience, the wealthy client pipeline, and the nine accelerators in each of the related strategies.

And if you go back to when you did your strategy session with us, what we call the best year ever consultation, and we went through and color-coded red for one of the nine accelerators, one or more of the accelerators that you really hadn't made much progress on yet. Yellow where we've made some progress, but not where we want to be, and green, where we've made some great progress.

Reflect where you are now. Very few of us are going to have all green because it takes more than just the program itself, the time that we allow for the program to accomplish it, but at the same time, we've made real progress and that's how it all starts coming together. So, as we look, you have made an amazing journey. And you're definitely much closer to fully achieving that practice of your dream, but you recognize it's an ongoing process and that's why we created Round Table.

# VIDEO TRANSCRIPTION

And I want to invite you ...To be the first one to invite you to explore joining us as a member. This is an invitation only program. We call it our mastermind group of Elite Wealth Managers. So, like you, every single member of Round Table is a graduate of either the Elite Wealth Manager or Breaking Through or one of our other foundational coaching programs. So, they are driven to higher levels of success. They're looking to consistently race up. And remember our definition of elite wealth managers, somebody who's been there and earned a net income of over \$3 million each of the last three years. And Round Table's designed to help you accelerate that journey, and at the same time, go ahead and make sure you're maintaining your momentum at each of these nine accelerators so that you can have the success at the top, or stay at the top if you're already there.

Now in Round Table, what we have is very much like the Elite Wealth Manager. We have monthly coaching, live sessions, get together twice a year in the San Francisco area, May and October, networking with your elite wealth managers. I mean, this is such an amazing part because there's so much talent in a room, and continuing access to all the tools we have so that you can accelerate your success upward, moving up that hierarchy of success.

And when it comes to speed, and that's what it's all about, Round Table members are moving up faster and staying higher than anyone else out there. If you want to go ahead and continue moving ahead at full speed, I'd recommend that you set up a call now with one of our consultants to determine whether Round Table is right for you, for what you want to achieve, your goals, so that you can lead that amazing life of significance. Your clients, your future clients, and those COIs are all counting on you. Don't let them down. We wish you the best of success.