

A Proven Business Building Program for Financial Advisors

Fill Your Pipeline with 99 Great Prospects in the Next 12 Months!

Implement My Unconventional but Powerful "Endorphin Event" Client-Acquisition Strategy



This is how one of my clients attracted \$100 million in new assets—Last Year!

Make a quantum leap in your success. Harness the power of positive emotions to attract and convert motivated, affluent prospects.

In this **one-on-one, phone-based program** you'll upgrade your value proposition. Then, you'll learn simple techniques to get prospects and professionals to want to work with you.

Next, you'll **identify ideal prospects** in your community. You'll also **build relationships with centers of influence**, such as trust and estate attorneys, and CPAs.

Then, we'll set up a series of fun and novel events for qualified prospects, key clients, and centers of influence.

You'll use the science of attraction, **Endorphin Events**, and my research of investor motivation, to solve the biggest problem facing investment advisors—how to consistently identify, build relationships with, and "on-board" high-net-worth clients.

This is how one of my clients raised \$100 million in new assets last year—and over \$850 million in the past 10 years!

Endorphin Event

Six Month Business-Building Program

Program Objective: Guide investment advisors as they build an profitable events-based marketing program.

Your Consultant: Steve Moeller, author of *Effort-Less Marketing for Financial Advisors*, expert on building wealth management businesses.

Includes: 12 – 90 minute calls over six months. 15 assignment curriculum, *Wealth Transfer Optimization Services* PPT presentation template. See list of Assignments on next page.

Who Will Benefit Most: Successful, client-centered investment advisors who want to a low cost and effort way to rapidly build assets under management, increase their recurring revenue, and their net worth.

Cost: \$3,995 for material and coaching calls to teach you how to build relationships with centers of influence and get introduced to their most motivated clients. \$495 for materials and \$595 per month for six months.

Steve Moeller's American Business Visions, LLC

"I landed two accounts totaling over \$5.5 million in new assets in the first 90 days of Steve's program." — Ray S., Dayton, OH

The Endorphin Event Business Development Program will empower you to:

- ❑ Upgrade your value proposition, marketing tools and activity levels;
- ❑ Learn how to **trigger positive emotions to attract ideal prospects and convert** them into happy clients;
- ❑ Meet and **build relationships with over 99 potential new clients** and centers of influence over the next 12 months!
- ❑ **Host fun and unique special events** that are irresistibly attractive to your top clients, ideal prospects and centers of influence;
- ❑ Break through the dis-trust barrier to **attract and convert \$250,000 to \$5,000,000 accounts**;
- ❑ Schedule 12 months of **lead and appointment-generating events to fill your sales pipeline**;
- ❑ Rapidly **upgrade your client base** with low-maintenance investors and bigger accounts;
- ❑ **Gather \$5 to \$20 million, or more, each year in new assets** with this systematic prospect-attracting and converting process.

"I streamlined my business, cut my client base in half, and added \$100 million last year. I've gathered over \$850 million in new assets in 10 years by using Steve's Endorphin Event strategies. More importantly, I'm enjoying my business and my life more than ever."

— Barry G., So Cal

To Enroll, or for More Information contact Steve at **714-505-8030** or smoeller@businessvisions.com

ENDORPHIN EVENTS

CLIENT ACQUISITION PROGRAM ASSIGNMENTS

Phase 1 – Prepare to Attract Ideal Prospects

- Assignment 1: Set Goals for the Program
- Assignment 2: Package to Attract and Convert Ideal Prospects
- Assignment 3: Learn the Power of Positive Emotions and How to Trigger Them
- Assignment 4: Create a Systematic Qualifying & Appointment Setting Process
- Assignment 5: Develop and/or Refine an Effective On-boarding Process
- Assignment 6: Turn Your Existing Clients into Marketing Apostles

Phase 2 – Identify Opportunities

- Assignment 7: Identify Ideal Rich Niches—For You
- Assignment 8: Identify and Prioritize Ideal Prospects
- Assignment 9: Identify and Qualify Centers of Influence

Phase 3 – Host Lead-Generating and Relationship-Building Events

- Assignment 10: Design Your Events and Identify Venues
- Assignment 11: Host Pilot Events and Follow Up with Appropriate Attendees

Phase 4 – Host Appointment-Generating Endorphin Event

- Assignment 12: Plan, Set Up and Market Appointment-Generating Event
- Assignment 13: Host Event, Follow Up with Appropriate Attendees
- Assignment 14: Implement and Refine Your Onboarding Process

Phase 5 – Systematize Your Client Acquisition Processes

- Assignment 15: Set Future Goals and Schedule 12 Months of Special Events

“In the first year of working with Steve I landed an \$8 million and a \$3 million account from entrepreneurs who were selling their businesses. They decided to work with me because I helped them figure out what they really wanted to do in the next chapter of their lives. Then I developed a plan to support their vision. Now they’ve become my marketing apostles”

— Tom W., Marlton, NJ