Now Experienced Investment Advisors Can

Capture $5 to $20 Million in New Assets in the Next 12 Months!

By Creating Strategic Alliances with Centers of Influence

The *Rapid Asset Accumulator* *program* is the fastest and lowest cost way to dramatically upgrade your client-base, attract $250,000+ accounts and increase your income.

You'll work over the phone one-on-one with Steve as you identify and build profitable business alliances with trust and estate attorneys, CPAs and other centers of influence.

This is a sophisticated and low-cost business development process that will empower you to consistently attract qualified, motivated wealthy prospects. Build a powerful marketing machine without spending tens of thousands of dollars in low-payoff advertising or expensive dinner seminars. Break out of the doldrums and take your business to the next level.

Enroll in this wealth building program and maximize your productivity, your income, and your wealth!

The Rapid Asset Accumulator
Six Month Business-Building Program

Program Objective: Build profitable strategic alliances with centers of influence.

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 (see curriculum on next page)13 assignment curriculum, *Wealth Transfer Optimization Services* PPT presentations. Plus email and phone support.

Who Will Benefit Most: Entrepreneurial, client-centered investment advisors with the time and resources to build strong relationships with attorneys, CPAs and other influencers.

Cost: $3,995 for material, conference calls and custom strategies to get you referred, introduced and recommended to your allied professionals' best motivated prospects. $445 for materials and $590 monthly for six months.

"I landed two accounts totaling over $5.5 million in the first 90 days of starting Steve's coaching program."

— Ray S., Dayton, OH

The Rapid Asset Accumulator
Consulting Program will empower you to:

- Create profitable strategic alliances with trust & estate attorneys and other COIs
- Develop custom strategies for each COI
- Attract and retain $250,000 to $5,000,000+ accounts–with very little cost
- Upgrade your value proposition to attract wealthier, more profitable clients
- Add tremendous value, quickly and easily, for your new allies and their clients
- Streamline your business to make it highly efficient, profitable and fun
- Host joint "Endorphin Events" to meet qualified clients of your allies
- Avoid fee-sharing, advertising costs, free meals and other marketing expenses
- Spend very little time and effort on marketing.

"I streamlined my business, cut my client base in half, and added $100 million in new money in the first two and a half years of Steve Moeller's consulting program. More importantly, I'm enjoying my business and my life more than ever."

— Barry G., So Cal

Steve Moeller's
American Business Visions, LLC

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

The Rapid Asset Accumulator Learning Materials

Build Profitable Relationships with Centers of Influence

Phase 1 – Prepare for Success

Assignment 1: Set Goals and Assess Current Resources

Phase 2 – Qualify & Engage Strategic Alliances

Assignment 2: Overview of the Strategic Alliance Process
Assignment 3: Identify Promising Candidates
Assignment 4: Prepare for and Conduct Your 1st Meeting (Qualify)
Assignment 5: Prepare for and Conduct Your 2nd Meeting (Identify Opportunities)
Assignment 6: Prepare for & Conduct Your 3rd Meeting (Brainstorm Next Step)
Assignment 7: Prepare for & Conduct Your 4th Meeting (Sell Pilot Program)

Phase 3 – Run a Pilot Program

Assignment 8: Plan the Pilot Program
Assignment 9: Learn to Identify Each Prospect's Emotional Hot Buttons
Assignment 10: Meet with "Hottest Prospects" -- Make an Irresistible Offer
Assignment 11: Host Special Events with the Center of Influence
Assignment 12: Guide Prospects through Your Onboarding Process
Assignment 13: Implement Your Recommendations and Open New Accounts

Customizable PowerPoint Presentations

Communicate Your Benefits Quickly and Powerfully
with Professional Marketing Materials

1. ***Wealth Transfer Optimization Services***™
    a. 9 PowerPoint slides, 10 to 15 minute presentation
    b. Communicates the benefits and process of a trust and estate attorney and Wealth Manager working in an alliance to help clients develop, fund and implement their "ideal" estate plan
    c. To be used with clients, prospects, trust and estate attorneys and other centers of influence.

"In the first year using Steve's process I quickly landed an $8 million and a $3 million account from entrepreneurs who were selling their businesses. Then I picked up an additional $5 million from the partner of one of my new clients." — Tom W., Marlton, NJ

"It's only October and by using Steve's processes I've already brought in over $22 million in new assets this year. That's 4.5 times more money than I ever attracted in any of my previous 21 years in the industry. After two decades in the industry I thought I had seen it all, but now I'm more excited and energized than at any point in my career. — George W, Princeton, NJ

For more information, call Steve Moeller smoeller@stevemoeller.com

or 714-505-8030