

Video

Graphic Overlay Title: In their Words, An advisor-specific growth plan

Graphic Overlay: Growth Accelerator

Graphic Overlay: Four separate progressive practice management models

Growth Accelerator program came at a very pivotal time in my practice. Moving over a very large book from a competing firm and when I first heard about it, you know, my thought was do I really have time to implement this, as well as bring over the clients.

Graphic Overlay: Strategy and progress reviews with First Clearing Growth Consultant

And you know what I really discovered is that when you sit down and meet with the client transferring a client, from any firm, and they sign the paperwork and they think tomorrow feels like just like the day before they signed. When really what you have to have is a process in place.

Graphic Overlay: Gave my practice an upgrade

And so, the Growth Accelerator program has just really given my practice an entire upgrade. This client service model knocked my socks off.

Graphic Overlay: Streamline process

It was really impressive how it streamlined how many times you meet with the client, what you best clients should really be doing, and it's not just assets – but are they referring back to you, how you deliver on that.

And it constantly reminded me is that, what the client really wanted to know is that you cared about them and that you cared about their goals and that you make the meeting very personalized.

Graphic Overlay: Personalized Services – client knows you care

And you know, so of the things about the Growth Accelerator program that I would like other financial advisors to know is how we really come in and how it changes your practice day-to-day. So, one of the things I implemented has actually been the prospect packet. This is a packet that on your own, I can see taking 6 – 9 months to develop and I'm not sure the quality would be as consistent.

Graphic Overlay: Prospect Packet

Graphic Overlay: It's already built for you

They not only told you examples about Growth Accelerator, they provided information to you, where all you had to do is customize it, to make it your own, so you're not starting from scratch.

Graphic Overlay: Dedicate Service model for referrals

So a great success story that I have just had this week with a prospect packet, is because of the Growth Accelerator, I now have an entire dedicated service model to my professionals that refer me business, which I had not had before, yet they were very important part to my practice. So I sent the introductory kit out to all my professional contacts and this week I got a \$5M lead back from one of them because they said there was no other team delivering this type of quality and the professionalism behind it how the impression it gave you when you opened up the packet. And I would not have had it with the Growth Accelerator program. It probably took me less than 2 hours to develop because your team at Growth Accelerator had spent the months to develop the finished product. And really now it's so embedded in my practice it is part of my practice.

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