Building A Financial Services Clientele 11th Edition

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Managing Through the One Card System provides step-by-step instructions for managing one or many financial representatives using the One Card System, the most successful practice management system. Drawing on more than 75 years of combined management expertise, noted One Card System consultants and authors Barry Alberstein and Delia Alberstein have once again collaborated with industry leader Al Granum to create the definitive text on proven management techniques for succeeding with the One Card System at the agency level.

The Supernova Model is a client service, client acquisition, and practice management model that drives an explosive acceleration in revenue and client satisfaction by capitalizing upon the 80/20 Rule. First implemented by financial advisors at Merrill Lynch—under the leadership of author Rob Knapp—it has grown increasingly popular within the financial services industry. The Supernova Advisor skillfully outlines this proven model and reveals how it can be used to create an exceptional experience for your clients, while significantly growing your business.

"As an asset protection lawyer, I think Mandell and Jarvis brilliantly explain the most effective wealth protection strategies. A must-read for advisors and clients alike." -Arnold S. Goldstein, PhD, LLM, JD author, Asset Protection Secrets "I really appreciate the 'Risk Factor Analysis.' It is a unique tool for diagnosing-and then solving-some of the toughest problems in maintaining and protecting your wealth." -Gordon Klein, JD, CPA, lecturer, UCLA's Anderson Graduate School of Management, frequent CNBC Commentator "Chris and David's concept of a 'Personal Economy' should be heeded by every individual investor. If you want to grow and shield what's yours, this book is a great start." -Jonathan Guryan, PhD, Asst. Professor of Economics University of Chicago Graduate School of Business The interest in protecting one's wealth is universal. Wealth Protection: Build and Preserve Your Financial Fortress serves as the ultimate handbook for readers who want to build their family's financial fortress and shield it from potential risks.

SELLING THE INVISIBLE is a succinct and often entertaining look at the unique characteristics of services and their prospects, and how any service, from a home-based consultancy to a multinational brokerage, can turn more prospects into clients and keep them. SELLING THE INVISIBLE covers service marketing from start to finish. Filled with wonderful insights and written in a roll-up-your-sleeves, jargon-free, accessible style, such as: Greatness May Get You Nowhere Focus Groups Don't The More You Say, the Less People Hear & Seeing the Forest Around the Falling Trees.

A must-have reference for financial advisors In step-by-step detail, Success as a Financial Advisor For Dummies covers how a current or would-be financial advisor can maximize their professional success through a series of behaviors, activities, and specific client-centric value propositions. In a time when federal regulators are changing the landscape on the standard of care that financial services clients should expect from their advisors, this book affords professionals insight on how they can be evolving their practices to align with the regulatory and technological trends currently underway. Inside, you ' ll find out how a financial advisor can be a true fiduciary, how to compete against the growing field of robo-advisors, and how the passive investing trend is actually all about being an active investor. Additionally, you ' ll discover time-tested advice on building and focusing on client relationships, having a top advisor mindset, and much more. Master the seven core competencies Attract and win new business Pick the right clients Benchmark your performance Start your own firm Brimming with practical expert advice, Success as a Financial Advisor For Dummies is a priceless success tool for any wannabe or experienced financial advisor.

The Productivity Planner is the ideal way to build your client base and reach your production goals through the tracking of daily contacts, appointments, presentations, and results. This proven tool will enhance the quantity and quality of your clientele while improving your effectiveness with prospecting and promotion.

Wow your customers . . . with "less." Cut costs-it's a common corporate refrain. But if you constantly slash expenditures, what happens to innovation? How can you stay competitive and satisfy customers? Costovation solves the dilemma of how to spend less and innovate more. The book's revolutionary approach broadens the definition of innovation beyond products to the business model itself. With costovation, you let go of assumptions, take a fresh look at the market, and relentlessly focus on what customers really want. Consider Planet Fitness-it grew to 7.3 million members by concentrating on casual exercisers. Those folks don't care about frills. They want easy, low-cost access to good equipment. Although it's inexpensive to run, Planet Fitness ranks highest in gym satisfaction. Gourmet grocer, Picard, sells only frozen food. With less perishable inventory, they compress costs while delighting a discerning but busy clientele. Packed with examples and interactive exercises, the book explores cost innovation strategies that work for big and small companies alike. From open innovation and cost-sharing to simplifying products and turning waste into new offerings-readers learn how rivals are carving out niches, protecting positions, and dominating industries. Innovation and cost-cutting are not opposites. Combined, they expose untapped opportunities to outsmart and underspend competitors.