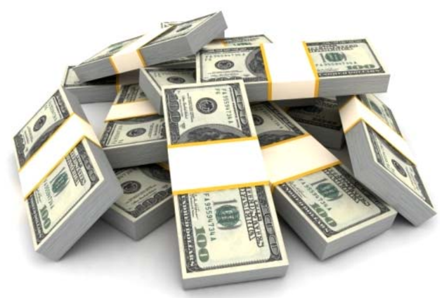
Now Competent Financial Advisors Can
CREATE YOUR OWN ECONOMIC RECOVERY PLAN

Capture $10 to $25 Million in New Assets in 2010!

Powerful, Focused, Completely Personalized Consulting

In this special report, I'll reveal an immensely profitable strategy for capturing assets for Wealth Management services—even in difficult markets.

Discover how my innovative ***Rapid Asset Accumulator*** program can help you:



- Add $10 to $25 million of new assets in 2010
- Dramatically increase your income
- Upgrade your client base
- Create a consistent flow of multi-million dollar accounts
- End client-acquisition challenges—for good
- Add millions to your net worth with just a few key alliances

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

Imagine this...

You spend most of your week generating revenue by providing professional services to profitable and appreciative clients—or building relationships with potential ideal clients. The investors instantly connect with you because of your consultative style and client-centered processes. Once they understand what you do, many of them hire you as their financial advisor.

Once you get up and running, you add 1 to 4 new households each month—with an average account size over $1 million. In 2010 you capture more assets and earn more money than ever before.

Here's how this can happen for you…

- You identify a few good candidates and **then build win-win strategic alliances with one or more trust and estate (T&E) attorneys** who fit my "ideal T&E attorney" profile.
- **Each month you meet with 5 to 10 of the attorney's best clients** in their offices to help them with a specific problem or concern.
- The attorney(s) encourages you **to offer each of his or her clients a complimentary "discovery meeting"** in *your* office
- Your initial "discovery" process is so irresistible that **most qualified prospects ask you for help and advice** with their investments and personal finances.
- You **don't share any of your revenue** from the attorney's clients and *the only cost is your time.*
- Your **new alliance(s) recommend you to other professionals so you can all work together** to generate even more business.

A Tested & Proven Process

You may be wondering, "Could this be possible?"

Yes!!

My *Rapid Asset Accumulator* process is already generating these amazing results.

I created this innovative marketing program to help client-centered financial advisors build their businesses—even during dismal markets. It utilizes the most powerful marketing, relationship building and "onboarding" processes that I've developed over the last 20 years.

Of course, this is the most sophisticated method of marketing one of the most sophisticated intangible services. So, only a handful of financial advisors in every city have the knowledge and interpersonal skills to successfully implement this strategy. But, **if you're a competent, entrepreneurial and relationship-oriented** *Wealth Manager* ***you can make millions of dollars with this proven process.***

> "***I captured over $60 million in five years from one attorney's clients***. *That one strategic alliance created the foundation for my entire investment advisory business."* — Mike D., RIA, Oakland, CA

Read on to learn my secrets—and discover how you can benefit from my new *Rapid Asset Accumulator* program.

The World's Best Client Acquisition Strategy

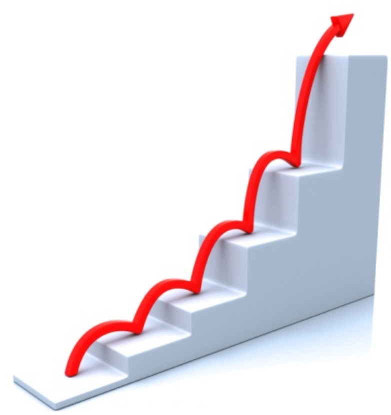
To quickly ramp up your assets under management, **you need to consistently have face-to-face meetings with qualified, wealthy clients.**

But passive referrals have dried up. **Out-dated prospecting tactics such as direct mail and public seminars are a waste of your time and money.** That's because **most intelligent high net-worth investors find their investment advisors providers through referrals and recommendations**.

So, over the past 20 years, I've consulted with dozens of advisors to help them create profitable relationships with CPA's, consultants, casualty agencies, associations, small banks, investment bankers and attorneys.

> ***"I landed a $4.5 million account the first time I used Steve's step-by-step*** *strategic alliance process. With Steve's guidance* ***I captured $55 million in new assets in two years***."
>
> — Carol V., CFP, Sacramento, CA

Here's why an alliance with one or more T&E attorneys is **the best way to add $10 to $25 million in new assets over the next 12 months.**



- **It's a Proven Success Model** — I've consulted with a number of top producers who created highly profitable alliances with T&E attorneys. One of them generated ***over $3 million a year in fees and commissions***!
- **Earn Huge Commissions with Prudent Insurance Sales** — I've worked with financial advisors who consistently earn over *$500,000+ a year in life insurance commissions serving this market!* ***(This alone, could be the biggest income generator of your career)***.
- **Attract Bigger & Better Accounts** — A CEG Worldwide survey of investment professionals discovered *the* ***biggest accounts in the previous year all came from T&E attorneys***. It only takes a couple of these $2 to $10+ million accounts to make a great year!
- **Raise Tens of Millions of Dollars, Each Year** — Alliance/Bernstein's sales people raise money by building relationships with professionals, primarily T&E attorneys. **Each of their sales professionals *consistently raises $75 to $100 million a year* *in new investment assets***!

So, you can see that this is a fantastic niche market for you. But why would the attorneys want to work with you?

Why T&E Attorneys Make the Most Powerful Alliances

Not all T&E attorneys will be a good fit for your services. But the right ones have at least seven key reasons to work with you.

1. **They Think Like You** — Your ideal T&E attorney is intelligent, knowledgeable, outgoing, entrepreneurial, client-centered and marketing oriented. **Competition is forcing them to seek new ways to add value for their clients**.

2. **They *Need* Your Services** — Established T&E attorneys have **structural business problems that you can help solve.** Very few T&E attorneys offer all the services their wealthy clients need to design, create, fund and efficiently transfer their estates.

   They can only solve their clients' problems and draft appropriate documents by working with a competent financial advisor. To serve this niche you'll need estate planning software, an insurance license and the ability to provide investment management services.

3. ***Their* Clients *Need* Your Services** — Their clients are mostly wealthy, married, age 50+, prudent investors who care about their heirs, are fairly organized and value planning. Many of their clients **are retired and have "liquefied" their businesses or "rolled over" their retirement plans**.

   People often seek the services of a T&E attorney when they are contemplating or going through a major life transition such as retirement, moving to a new state, or the death of a spouse. These **transitional events often create "money in motion" and a pressing need for competent financial advice.**

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

4. ***They Have Lots of "Hidden Assets"*** — Each ideal T&E attorney has between 50 and 150 qualified prospects for Wealth Management services. That translates to between **$50 and $300 million of potential investable assets, per attorney.** You can see why it only takes a couple of alliances to quickly capture $10 to $25 million in new assets.

5. **Generate *Quick Cash Flow*** — In addition to capturing tens of millions of new assets, **this niche also has major opportunities for life insurance commissions**. These periodic "big pops" of cash-flow can be lifesavers as you rebuild your income base.

6. **[Keep 100% of Your Additional Revenue]** — With my process, you **help the attorneys generate more income for themselves, from their current clients and prospects. That means you won't have to share any of your revenue with them**. It also eliminates compliance headaches, legal expenses and business risks involved in a formal joint venture.

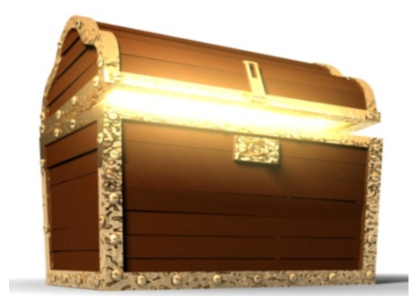
7. **[Everybody Wins]** — With this strategy, you provide professional services for the attorney's clients—in exchange for the *opportunity to build business relationships with their clients*. In the process you can **generate tens or even hundreds of thousands of dollars for both of your firms.**

   Ultimately, the clients are the biggest winners because they get a coordinated, integrated and sophisticated estate plan—with appropriate investment and insurance solutions.

Clearly this niche is a potential gold mine. But, how do you convince the attorneys to work with you? **It's all about adding value by creating synergy**.

> ***"In the first six months of Steve's program, I put over $14 million in new money under management."***
>
> — *Tom H., CFP, Indianapolis*

The Secret: Add Value in Unconventional Ways



Positive positioning starts with your very first contact. With my process, the attorneys will **see you as a valuable ally who can help them win clients and increase their income.**

To capitalize on this "positive anticipation" **your potential allies must perceive you as *significantly more competent and trustworthy* than any other financial advisor**.

The key is to **identify professional services, or advice, that you are willing to provide for free (or for a very attractive fee) that will help each attorney provide a "total solution" for his or her clients**.

You'll need to add value in ways that are meaningful for each attorney; based on their unique situation, goals and opportunities.

For example...

- **[Organize Wealthy Clients' Assets]** — **When a T&E attorney meets with a high net worth prospect, they typically hand them a fact finder and say something like, "Come back after completing this form."**

  Most of the time, they never hear from these potentially lucrative prospects again. **So, one strategy is to offer to document all the assets for each of the attorney's wealthy prospects and clients.** (Of course, you can charge for any of your services if the investors are willing to pay.)

- **Develop Estate Plans for Wealthy Clients** — You may not realize this but very few T&E attorneys actually do any estate *planning*. They simply draft legal documents. This means **they typically miss out on the sophisticated planning opportunities that can generate thousands of dollars in additional legal fees.**

  When you prepare an estate plan for their wealthier clients, **you will *demonstrate your competence* and *build your relationship***.

  This type of "test drive" is **the most effective way to market financial advisory services.**

> ***"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 attracted in any of my previous 21 years in the industry.*
> — George W., RIA, Princeton, NJ

- **Help Wealthy Clients Fund their Trusts** — You can offer to transfer all of their clients' assets into trusts and other business entities, once they've been drafted. This is one of every T&E attorneys' biggest concerns. **Every one of their clients needs help funding their trusts, but most attorneys don't offer this critical service.** (One attorney gives his clients a 30 page document explaining how to properly fund their trusts.)

- **Generate Recurring Revenue for the Attorney** — Another big opportunity is that T&E attorneys don't have a recurring revenue model. I've devised an easy-to-implement service that solves this problem. **You get to build a relationship with each of the clients who sign up for the service.**

  The attorney gets to collect an annual fee that could easily add up to tens or even hundreds of thousands of dollars.

I could go on. There are lots of different strategies and combinations of strategies. Every situation requires a different solution. **But, even if Congress eliminates the estate tax entirely there will always be ways to add value for the attorneys and their clients.**

> *"I* ***made over $350,000 in GDC in the first 60 days using the techniques I learned in Steve's business development program****. I'm closing bigger accounts than ever. Your system is so effective I trained a new agent and he made $12,500 in his first month."*
> – Herb S., Agency Manager, Honolulu, HI

Create a Total Solution for the Clients
& a Profit Center for the Attorney

The bottom line is; **most T&E attorneys don't offer all of the services that their clients need.** They simply draft legal documents. They don't do empathetic listening, life coaching, financial modeling, investment management or provide life insurance.

Attorneys don't have the knowledge, software, experience, or communications skills that you have. **Their limited focus means they are leaving a ton of money on the table—and failing to meet all their clients' needs.**

By working closely together you can provide a **more complete solution for the clients and a more profitable business model for both of your firms**.

Instead of spending your valuable time trying to find qualified prospects, now you can **spend your marketing time in face-to-face meetings with ideal prospects.**

The *Rapid Asset Accumulator* Program

In this program you'll learn the fastest way to identify and build relationships with the best potential alliances in your market area. I'll help you see the big picture and guide you as you implement the smallest details. **You'll hit the ground running and will be effective in you first meeting.**

I'll also teach you powerful "consulting" techniques based on positive psychology that will help you convert more wealthy prospects into clients.

You'll be surprised how many clients ask you, "What do we have to do to get started?"

So, here's how we would work together:

- **One-On-One Consulting Calls With Me** — Normally **we will talk every week for about an hour** until you can run this program by yourself. I'll walk you step-by-step though the entire process. We'll prioritize your opportunities and brainstorm the best strategies for each attorney.
- **Learn the Strategic Alliance Process** — From identifying potential alliances, and qualifying them, to opening your first account, **I've documented the entire process in 20 learning modules.**

  The typical alliance-creating process starts with four formal meetings with each attorney. **This gives you ample time to *build trust* and complete the discovery and recommendations process**. The next step is to run a "pilot program" which means you start meeting with the attorney's most promising clients.

> ***"In the first year of Steve's business development program I captured over $200 million of new investment assets.*** *The future looks very bright."* — Paul E., RIA, Pittsburgh, PA

- **Use My Phone Scripts, Interview Questions, E-mails, Forms & Marketing "Tools" —** You'll also receive copies of all the tools I've developed to communicate and "sell" your services to your alliances and their clients. **These customizable marketing tools are all designed to subconsciously communicate your trustworthiness, competence and professionalism.**

- **Communicate Your Benefits with Professional PowerPoint Presentations** — **One of the biggest challenges of marketing Wealth Management services is that nobody knows what you do.** Helping the attorneys and their clients understand how your services will benefit them is critical to your success.

  To solve this huge problem, I've created two professional quality PowerPoint presentations that **communicate your benefits and build desire for your services.** I'll teach you how to deliver these presentations for maximum affect.

  1. ***Life & Wealth Optimization Services*** explains the benefits of Wealth Management service—from the client's point of view. **Illustrates how you help investors use all their resources to support their best possible life.**
  2. ***Wealth Transfer Optimization Services*** explains the benefits, to clients, of your strategic alliance with the T&E attorney. Both you and the attorney(s) can **use this presentation to communicate your *total solution* to prospects**, clients and other professionals.

  Most compliance officers love my marketing tools because they clearly explain your advisory processes and manage client expectations—without being promissory.

- **Streamline Your Recommendations & Service Model** — In addition to teaching you my strategic alliance process, I'll also help you simplify, streamline and optimize your "on-boarding" (client planning & recommendations) processes and periodic service meeting processes. My 21st century "scenario planning" process elevates you to a true "decision facilitator" instead of an "advice seller". It also **dramatically reduces the time you have to invest to get each prospect to hire you.**

- **Learn as You Earn** — Each week we'll set action steps and discuss your progress and opportunities until you identify one or two "ideal alliances." **Our focus will be generating revenue as soon as possible.** Just one new account could cover my consulting fees for the whole year.

I've already created and tested everything you'll need to get up and running in the shortest possible time.

Advisors Who Will Benefit Most

Because of my other commitments, **I can only accept 10 new clients** for this specialized consulting service.

You Will Make the Most Money in the Shortest Amount of Time if You…

1. **Are already a successful financial entrepreneur but want to grow your businesses to the next level**
2. Have a solid client base and an excellent support team
3. Don't just want more clients, you want to "move up the food-chain" to attract wealthier and more appreciative clients
4. Are licensed, or registered, to offer investments, insurance *and* advice
5. Know how to do financial and estate planning and are open to Life Coaching or Life Planning services
6. Have the knowledge, skills and tools to solve complex financial problems.
7. Have a very high closing ratio with qualified prospects
8. Have the capacity to rapidly add new clients and assets
9. Are a strategic business and relationship builders, not a "hard closer"
10. Are goal and action-oriented
11. Are client-centered, process-oriented and coachable
12. Want to take control of your financial destiny and make 2010 your best year ever

Most importantly, you must be capable of working closely with other professionals. **Credentials aren't as important to me as demonstrated success in attracting new clients.**

Finally, you have a realistic budget for building your business and you are **committed to adding $15 to $100 million in new assets over the next few years.**

End Business Development Challenges for Good

These uncertain economic times are threatening many advisors' businesses. At the same time, **we're facing an historic opportunity** as investors seek professional help to rebuild their portfolios and reevaluate their goals.

In today's challenging environment, the key to stabilizing your current business and adding new assets is "Qualified Prospect Flow." That's exactly what this program creates.

In good markets this is a great business-building strategy, in rocky markets, it's essential. What other process can empower you to consistently meet with ideal prospects—no matter how much time or money you spend?

Look at the potential payoffs for you:

If you just **bring in $10 million dollars in the next 12 months and put it *all* into *managed accounts…***

You'll generate about $50,000 in the first-year from planning and asset-management fees (assuming you charge 1% for management, a modest fee for planning and recommendations, and add accounts throughout the year).

You'll also earn somewhere between $10,000 and $50,000 in life insurance and LTC commissions. ***Plus***, you'll add about ***$200,000 in business equity*** because of your increased recurring revenue. ($10 million x 1% fee = $100,000 recurring gross revenue x 2 ≈ $200,000+ in equity value.)

So, even if you only achieve minimal success, **you'll easily generate over $75,000 in additional income and $200,000 in equity, *in the first year alone.*** (And you'll generate about $100,000 every year in recurring revenue.)

Of course, you can also put all of the new assets into annuities and mutual funds.

That could easily generate over $500,000 a year in commissions,
just from investment sales alone!

Here's the Good News!!

My one-on-one consulting starts at only
$750 a month and usually maxes out at $1,500.

So, if you only achieve *minimal success*, pay my *maximum fee*, and put all your NEW investments into managed accounts, you'll still earn a whopping

1,400% first year ROI from this program!!

Once you learn this process, you can use it for ***FREE*** for the rest of your career and teach it to others. After you create a few strategic alliances**, you'll never have to worry about Qualified Prospect Flow again.** You'll be buried with qualified, motivated wealthy prospects who value your advice and services.

Take the First Step to a More Prosperous Future

I've spent the last 20 years helping thousands of motivated financial advisors move up the food chain to work with wealthier clients. **Now, I'm going to help 10 client-**

centered investment advisors implement the most effective asset accumulation strategy I've ever created.

If you're ready for this type of strategic business development program, then I invite you to apply.

> *"I streamlined my business, cut my client base in half, and* ***added $100 million in new assets in the first 2.5 years of Steve's consulting program****. More importantly, I'm enjoying my business and my life more than ever."* — Barry G., Glendale, CA

Here's what you need to do.

Call me to request the complete program details, an application form and a personal interview. My number is **800-678-1701**. Or simply e-mail me at smoeller@businessvisions.com.

2010 will be a transitional year for many advisors. Some will leave the industry. But a few entrepreneurial advisors will dramatically increase their incomes.

I've opened the door to opportunity for you. Are you ready to step through?

Call me at 800-678-1701. I'll answer all your questions about the quickest way to *attract $10 to $25 million in new assets over the next 12 months.*

Good luck and good marketing.

Sincerely,

Steve Moeller
CEO
American Business Visions, LLC

P.S. **The *Rapid Asset Accumulator* program will sell out quickly.** If you want to create your own economic recovery plan, call me today to discuss your unique situation and opportunities.

It could be the smartest business move you've ever made.