

Now Competent Investment Advisors Can
Capture \$10 to \$25 Million
in New Assets in 2010!

Powerful, Focused, Completely Personalized Consulting

The Rapid Asset Accumulator program is the fastest way to dramatically upgrade your client-base, increase your income and your assets under management.

You'll work over the phone directly with Steve as you build profitable alliances with trust and estate attorneys. You'll learn a step-by-step process to identify, qualify and engage these powerful centers of influence.

This is a sophisticated and low-cost business development process that will empower you to consistently attract \$500,000 to \$5 million+ accounts. Build a powerful marketing machine without spending tens of thousands of dollars in low-payoff advertising and free 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
Consulting Program

Program Objective: Focus on building profitable strategic alliances with trust & estate attorneys.

Program Length: 6 to 18 months (average)

Includes: 20 assignment curriculum, *Life & Wealth Optimization Services & Wealth Transfer Optimization Services* presentations. Templates phone scripts, letters, emails, forms, etc.

Who Can Benefit Most: Entrepreneurial, client-centered, advisors with an appropriate marketing budget and at least one support person. Or, aggressive advisors who want to quickly build their assets under management. Key managers and staff may participate in calls and implementation.

Cost: \$750 to \$1,500 a month. First and last month's deposit plus \$1,500 presentations and materials licensing fee required to start.

"I landed two accounts totaling over \$5.5 million in new assets 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
- ❑ Attract and retain \$500,000 to \$5,000,000+ accounts—with almost no cost
- ❑ Upgrade your marketing tools and service model to attract wealthier, more appreciative 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
- ❑ Learn a scientifically-based sales process that is irresistible to wealthy clients
- ❑ Turn your best clients and centers of influence into *marketing apostles*
- ❑ Avoid fee-sharing, advertising costs, free meals and other marketing expenses

"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 the Steve Moeller's consulting program. More importantly, I'm enjoying my business and my life more than ever." — Barry G., Glendale, CA

Steve Moeller's
American Business Visions, LLC

Transforming the Investment Industry

To Enroll or for More Information call Steve Moeller at 714-505-8030 or email him at smoeller@businessvisions.com.

THE RAPID ASSET ACCUMULATOR PROGRAM

LEARNING MODULES & TOOLS IN MS WORD DOCUMENTS

Phase 1 – Prepare for Success

- Introduction to Program
- Assignment 1: Assess Your Business & Personal Strengths
- Assignment 2: Overview of the Strategic Alliance Process
- Assignment 3: Package to Attract Ideal Alliances and Clients
- Assignment 4: Identify Promising Candidates
- Assignment 5: Customize & Learn the *Life & Wealth Optimization Services* presentation
- Assignment 6: Prepare for & Conduct Your *Qualifying* Interview

Phase 2 – Qualify & Attract Ideal Alliances

- Assignment 7: Prepare for & Conduct Your *Desired Payoffs* Interview
- Assignment 8: Prepare for & Conduct Your *Identified Opportunities* Interview
- Assignment 9: Prepare for & Conduct Your *Pilot Program* Interview

Phase 3 – Run a Pilot Program

- Assignment 10: Finalize Details for Pilot Program
- Assignment 11: Define Your “Onboarding” Conversation & Processes
- Assignment 12: Meet with “Hottest Prospects” -- Make an Irresistible Offer
- Assignment 13: Guide Clients through Your Scenario Planning Process
- Assignment 14: Implement Your Recommendations and Open New Account

Phase 4 – Ramp Up Your Marketing Activities

- Assignment 15: Set Goals & Activity Levels
- Assignment 16: Develop a 12 Month Action Plan
- Assignment 17: Systematize Meetings and Onboarding Processes
- Assignment 18: Build Your Team to Optimize Your Business & Quality of Life
- Assignment 19: Pursue Additional Opportunities -- Wealth Transfer Optimization Services
- Assignment 20: Host Special Events for Clients, Centers of Influence & Friends

“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

THE RAPID ASSET ACCUMULATOR

Customizable PowerPoint Presentations

Can be used with clients, prospects, T&E attorneys
and other centers of influence

1. Life and Wealth Optimization Services™

- a. 17 PowerPoint slides, 15–25 minute presentation
- b. Includes script, powerful photos and graphics
- c. Communicates the benefits and process of comprehensive Wealth Management Services
- d. Communicates how you integrate “life coaching” with scenario planning, financial advice and investment management
- e. To be used with clients, prospects, T&E attorneys and other centers of influence.

2. Wealth Transfer Optimization Services™

- a. 9 PowerPoint slides, 10 to 15 minute presentation
- b. Communicates the benefits and process of a T&E 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, T&E 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

Three Reasons to Apply Today

1. Proven, ideal-client acquisition strategy focused on centers-of-influence serving the wealthy.
2. Fully documented, step-by-step curriculum.
3. Hands on personalized consulting, as you implement

Steve Moeller smoeller@businessvisions.com or 714-505-8030