

Optimize Your Marketing, Your Business & Your Life

Attract \$500,000+ Accounts for Your Investment Advisory Business!

With Steve Moeller's *Visionary Advisor Coaching & Consulting Program*

The *Visionary Advisor Coaching and Consulting* program is the quickest and easiest way to dramatically increase your recurring revenue—and the quality of your life.

You'll work over the phone directly with Steve to implement business development strategies that Steve has refined over the last 19 years. You'll learn and implement proven tactics that fit your personality and your unique opportunities. You'll quickly and inexpensively attract \$500,000+ accounts.

Package and position your business to attract low-maintenance, wealthy clients. Streamline your business and focus on a manageable number of wealthy families. You'll make more money with less effort. Best of all, you'll have more time to enjoy your rising income.

Enroll in this wealth building program and optimize your business, your client-base and your life!

The Visionary Advisor Coaching & Consulting Program

Program Objective: Focus on specific business development issues that are unique to larger firms or more aggressive business builders.

Program Length: 6 to 18 months (average)

Includes: 33 assignment curriculum and *Life & Wealth Optimization Services* presentation. Templates for creating customized marketing materials.

Who Can Benefit Most: Entrepreneurial, client-centered, advisors with 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: \$350 per hour. \$525 to \$1,500 a month, depending on number of hours. 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 Visionary Advisor program." — Ray Scacchetti, Dayton, OH

The Visionary Advisor Coaching & Consulting Program will empower you to:

- 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 ideal clients and prospects
- Identify and serve *rich niches* that are full of wealthy, motivated prospects
- Streamline your business to make it highly efficient, profitable and fulfilling
- Learn a scientifically-based sales process that is irresistible to ideal clients
- Create profitable strategic alliances with estate planning attorneys, CPAs and other centers of influence
- Turn your best clients and centers of influence into *marketing apostles*
- Stand out in the crowd by offering *Life and Wealth Optimization Services*

"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 Visionary Advisor Program. More importantly, I'm enjoying my business and my life more than ever." — Barry Garapedian, 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

VISIONARY ADVISOR PROGRAM

ASSIGNMENTS IN MS WORD DOCUMENTS

Phase 1 – Create Your Compelling Vision of Success

Introduction to Program

- Assignment 1: Assess Your Current Business
- Assignment 2: Clarify Your Business Interests, Purpose and Profit Drivers
- Assignment 3: Learn About the Science of Happiness
- Assignment 4: Envision Your Ideal Future
- Assignment 5: Select Preliminary Target Markets

Phase 2 – Create & Package Your “Irresistible Offer”

- Assignment 6: Position to Attract Ideal Clients
- Assignment 7: Package to Attract Ideal Clients
- Assignment 8: Learn the Life & Wealth Optimization script
- Assignment 9: Learn the Vision Coach process
- Assignment 10: Set Goals and Activity Levels

Phase 3 – Identify Specific Opportunities

- Assignment 11: Manage Your Time Effectively
- Assignment 12: Ask Your Key Clients for Advice & Support
- Assignment 13: Generate Referrals & Introductions to Ideal Prospects
- Assignment 14: Interview Centers of Influence to Discover Hidden Opportunities
- Assignment 15: Release Inappropriate Clients

Phase 4 – Create Lead Generating & Conversion Processes

- Assignment 16: Create a Systematic Qualifying & Appointment Setting Process
- Assignment 17: Create a Systematic New Client Engagement Process
- Assignment 18: Overview of the Strategic Alliances process
- Assignment 19: Profit from the Power of the Press

Phase 5 – Systematize Your Marketing Communications

- Assignment 20: Prioritize Your Opportunities
- Assignment 21: Host Special Events for Clients, Centers of Influence & Friends
- Assignment 22: Start Relationships with Ideal Prospects
- Assignment 23: Harness Your Inner Genius with Affirmations
- Assignment 24: Develop a 12 Month Action Plan
- Assignment 25: Nurture Your Clients, Prospects and COIs

Phase 6 – Optimize Your Business

- Assignment 26: Optimize Your Business Processes
- Assignment 27: Convert Traditional Accounts to Fees
- Assignment 28: Hire Phenomenal Employees
- Assignment 29: Optimize Administrative Functions
- Assignment 30: Document Administrative Procedures
- Assignment 31: Optimize Operations Resources
- Assignment 32: Optimize Operations Procedures
- Assignment 33: Document Marketing Procedures

Version 3

THE LIFE & WEALTH OPTIMIZATION SERVICES

Value-Added Business Development System & PowerPoint Presentation

Integrate Life Coaching with Financial Planning and Wealth Management

- 1. Customizable PowerPoint Presentation**
 - a. *Life and Wealth Optimization Services™* (17 PowerPoint slides, 15–25 minute presentation).
- 2. Support Materials**
 - a. Instructions
 - b. Forms
 - c. Scripts
- 3. Samples**
 - a. *Living in the Endorphin Zone™ PowerPoint presentation*
 - b. *Envision Your Ideal Future™ PowerPoint presentation*
 - c. Collateral materials

“In the first year I landed an \$8 million and a \$3 million account from entrepreneurs who were selling their businesses. They decided to work with me because I used Steve Moeller’s new Vision Coaching services. I helped them figure out what they really wanted to do in the next chapter of their lives. Then I developed a plan to support their ideal future.” — Tom Weirich, Marlton, NJ

CREATE PROFITABLE STRATEGIC ALLIANCES WITH CENTERS OF INFLUENCE

ASSIGNMENTS IN MS WORD DOCUMENTS
Six Assignments with scripts, forms, letters, etc.

Assignment 1: Target Specific Opportunities

Assignment 2: Prepare for & Conduct 1st Interview

Assignment 3: Discuss 1st Interview – Prepare for & Conduct 2nd Interview

Assignment 4: Discuss 2nd Interview – Prepare for & Conduct 3rd Interview

Assignment 5: Discuss 3rd Interview – Prepare for & Conduct 3rd Interview

Assignment 6: Discuss 4th Interview & Next Steps

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“It’s only October and by using Steve’s Visionary Advisor process I’ve already brought in over \$22 million in new assets this year. That’s 4.5 times more money than I ever raised 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 Wislar, Wislar Wealth Management, Princeton NJ