ADVANCED CONSULTING GROUP

SUCCESS IS A CHOICE

Our coaching platform was designed to help Financial Advisors who need:

Structure

Comprehensive Business Planning

Organization

A Client Service Platform

Book Segmentation

Goal Planning

A Strategic Marketing Plan

Accountability

Action Plan Development

Team Structure and Development

A Sales Cycle/ Process

Advanced Consulting Group
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OUR MISSION

We are committed to being the standard of excellence in our industry. We work with you to establish clearly defined goals and develop a plan of action to achieve those goals. We deliver strategies and tactics proven to double your production and asset base. By utilizing our services you will achieve tangible results.

PROJECT NEXT LEVEL

We use the following high-payoff, proactive, business development, asset-gathering activities to customize and tailor a plan that will double your production in 18-36 months:

- ❑ Centers of Influence
- ❑ Proactive Client Service Platform
- ❑ Professional Referral Prospecting
- ❑ Niche Marketing

We are known in the industry for team building, taking the entire process from A to Z.

- ❑ Evaluating "Is a team right for me?"
- ❑ Structuring a commission grid
- ❑ Defining roles and responsibilities for each team member
- ❑ Developing a team agreement
- ❑ Creating and implementing a team business plan

The following are also integral to our process:

- ❑ Action steps for transitioning to fee-based
- ❑ Tracking system
- ❑ Concierge piece/ marketing brochure
- ❑ Time management
- ❑ Post-sale WOW platform

WHY SHOULD YOU WORK WITH US?

- ✓ No contracts - we either achieve the desired results or the cord is cut.
- ✓ We work with you to form your habits and then your habits will form you.
- ✓ We are not a motivation coach; we are a performance coach - think investment, not expense.
- ✓ Your thrust forward is generated from set weekly phone consultations to drive the agreed upon plan and secure the desired results.
- ✓ We provide all tracking, scripting and development tools – turnkey, not boilerplate.
- ✓ Our resources are vast, as we consult Financial Advisors throughout the entire country, gathering from the best practices nationally.

MEET PAUL ROSS

With over 25 years of consulting experience, Paul has developed extensive leadership and management experience which reflects his strong team building skills and his ability to inspire and help others accomplish their goals. Over the past many years, he has worked with Wells Fargo Advisors, Raymond James, Morgan Stanley, LPL, MassMutual, and Merrill Lynch, to name a few, and he has worked with several thousand Financial Advisors nationally ranging in production from $350,000 to over $10,000,000. Paul frequently speaks on team building, goal setting, time management, motivational management, professional selling skills, and personal attitude development, and has been featured in numerous publications. He has been the keynote speaker at several national industry symposiums and is currently writing his first book on business development strategies for Financial Advisors. Paul graduated from the University of Georgia with a B.B.A. in Marketing. In his spare time, he enjoys golf, tennis, travel, reading, as well as spending time with his three sons, Karl, William and James.