

SPECIAL REPORT

Why

99%

**of ALL Sales &
Marketing Systems**

FAIL

and WHAT

EVERY ADVISOR

NEEDS TO KNOW

Wealth™ 

FINANCIAL GROUP

The #1 Coaching IMO in America

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Why YOU, as a Top Advisor, MUST READ This Report ...

Like you, I am selling on the front lines every day. While I have extensive responsibilities to my marketing organization, about 25% of my time is devoted to building my retail business. I see clients, prepare financial plans, design marketing plans and, of course, I sell. I take what I learn, revise it, make it duplicable, and then pass it along to my agents. After almost 20 years in the business I have learned one truth: *nothing is as it appears to be*. Most theories, opinions, and beliefs about selling and marketing that industry leaders, superstars, mentors and gurus told me would “deliver the kingdom” have, in fact, delivered quite something else.

PURGE Your Current System of Beliefs

While reading this report, I would encourage you to take a few steps back and imagine that you are so cynical that even if the results you are getting now are terrific, you doubt that what you are doing is actually the best strategy for you or your business, and that *there must be a better way!* I encourage you, when you feel yourself defending your current methods, telling yourself that they are good, and right, and productive, and that the material presented here is just a lot of blue sky (and you will find yourself doing that), just for the time it takes you to read this report, *don't listen to that voice*, as loud and as convincing as it might seem.

TRUE CHANGE is More Than Skin Deep

My first thoughts in sitting down to write this report were to focus on the nuts and bolts—the nitty-gritty ways to make more money and to grow your business. The more I wrote, however, the more I realized that just focusing on the nitty-gritty of making money would, in my mind, be doing a disservice to you (and your clients).

Why? Because in my own journey, I've come to realize that if I didn't change myself from the inside out, what I did on the surface—the nuts and bolts—while feeling or looking different than what I had done in the past, *didn't really change anything*. I was still the same person! So, in this report, while I do give you nuts and bolts advice, I also draw your attention to some rather philosophical concepts which, I believe, set the table and *empower real change and personal growth*.

Each section that follows ranges from the philosophical right down to the nitty-gritty of exactly what to do next in your business. So, let's start with the biggest, most interesting, complex and wonderful thing I know—you!

- Section I - You

What They Sold You: It's all about the money.

What They Missed: It's not about the money,
it's about *Life!*

What This Means for YOU: Meetings with clients should be sessions of *mutual inspiration* instead of salesperson/prospect hide-and-seek, focused on chase and close.

YOU are an Inspiration

I don't know you personally, but I know this: you are an inspiration. You may be on the top of your game, or you may be thinking you just don't have what it takes to make it in this business, or you may be somewhere in between. No matter, *you are an inspiration*. Anything else you may think about yourself that makes you think or feel less than being a being of pure inspiration is simply untrue. Something inspired your first breath and that something inspires you today. You are complete in that inspiration as you are and that inspiration is what sustains your life.

While you are an inspiration, so too is every other human being. Just look around you at the people nearby. They are no different than you—beings of inspiration; full of inspiration; alive with inspiration.

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Now stop, take a deep breath, and take in what surrounds you—your office, your home, your garden, the trees, the sky, mountains, the lake, the parking lot, the cars, the machines, the stapler on your desk. Ask yourself, “How did this all get here?” For better or worse, they too are the inspiration of something or someone.

The truth is that you, your nature, the whole human-made and nature-made world, are the result of, and alive with inspiration. And, to truly change, to grow in business and to grow personally, *that inspiration must first be recognized, appreciated, nurtured and released.*

Sure, marketing strategies are important and we have, at Wealth Financial Group, effective strategies for almost every budget and style; sure, selling is important, and we have a selling system that will absolutely create more sales with less effort. But, without a shift in understanding *you*, without a shift in your world view, you *could* implement our strategies and make more money, but the *real meaning* of what is available to you would be missed.

At the end of the day, you are not in this business to make money and, for that fact, your clients don't make changes because of money. *The real truth is that it is never about the money*—for you or your clients. Never!

This business is about you at much deeper levels than money; it is about your clients at much deeper levels than

Section I – **YOU**

money. It is about you getting in touch with the inspiration that you are; it is about getting in touch with the inspiration your clients are; and then it is about unleashing both you and your client’s inspiration with such power and purpose that they *cannot help themselves but to buy*, and you cannot help but to have a greater sense of fulfillment than you ever thought possible.

The Nitty-Gritty:

The steps to finding you and your client’s inspiration are built into the marketing and selling systems we provide. We show you *the linkage that propels inspiration into action*, effecting change from within you, and from within your client. In our system there is no pulling, pushing or chasing. Everything happens organically and flowers naturally into deep relationships, high levels of trust, and bottom line profits.

Messages from the Front Lines:

“I’ve never been with a marketing organization that put a premium on inspiring me instead of how much money I can make for them. They have also taught me how to inspire my clients to buy. So, I am making more, and enjoying it more—a combination that’s hard to find.”

— Rick A., North Carolina

- Section II -

Your Space

What They Sold You: It's all about helping clients.

What They Missed: It's all about personal growth within you.

What That Means for You: When you decide to change as a person, to dig deep and approach life from a more conscious, reality-based perspective, then, and only then, can you also inspire other people to change. All this from a perspective of *deep respect, appreciation, and organic wholeness—a process that is mutually inspiring*—and, by the way, your and their birthright.

YOU Are the Center of Your World

You occupy space in this world. At the center of that space is you; immediately expanded from you is your family, then your friends, and so on. Your core space, the space within you, is a very private place. No one walks around with a loudspeaker attached to their core space that broadcasts their deepest feelings and desires. This is the place where you carry the most meaningful emotions, the emotions that move you into action. In fact, *every action you take is inspired by what is held important in this very deep emotional center.*

People come into and leave your space all the time. As a financial professional you invite people into your space, and

Section II – **Your Space**

they invite you into theirs, to see if it is possible to somehow improve. Unfortunately, we put the people entering our space into different classifications: some we call plate lickers; some are good prospects; some are pains in the butt; others are a waste of time. So it goes, day after day, person after person.

The Limitations of Classifications

By classifying people, we limit them. At the same time, ***we also limit ourselves and our businesses.*** Classifying people denies who they are and what they represent. It denies who you are and what you represent. Instead of being inspired by our clients, we are drained by them. Instead of us inspiring our clients, we try and get something from them—a sale. In this light, sales calls become an energy drain and leave us exhausted at the end of the day. ***Neither client nor agent really feel satisfied in this low-level mode of thinking and being.*** You sell, you classify, you try to “get.” Clients hide, clients lie, and they try to “get.” In a sense, life, which should be full of inspiration, becomes a drain that only inspires difficulty, disappointment, a desire to win at any cost, a fear of loss, and a constant defense of one’s self esteem.

Whether you are making a little or a lot of money, your day is filled with a constant battle within yourself and with your clients. And, it is a battle that you cannot win because the battle is not based on reality. ***The real battle is within you and how to release the inspiration of which you are made.*** The real battle is how to help your clients connect with

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what inspires them and then help them get what they need and want. It is not a battle of wills; it is not a battle to see how many appointments you can get (yes, I know you need appointments); it is not a battle to see if you can close the sale. ***There is only one battle, and that is within you—how you want to be in your world.***

The Nitty-Gritty:

We are not psychologists, but we do understand the psychology of people. Our knowledge base of how human beings work—what makes them tick, their fears, their desires, what they are searching for—is vast. We are dedicated to passing that knowledge along to you in essential systems that work for you on your behalf and your client’s behalf. ***Nothing in our coaching and training is left to chance.*** We take care of you, the details of you and your business, so that you can take care of your clients and, at the same time, watch your business and life skyrocket.

Messages from the Front Lines:

“I have seen myself grow as a person, and watched my business grow as a real business. The coaching is the best I’ve ever seen and nothing is held back. These guys are 100%, 24 hours a day, right there with me. I am so grateful.”

— Barbara T., Colorado

- Section III -

Your Emotions

What They Sold You: Manipulative, old-school selling techniques.

What They Missed: Sales are the outcome of satisfying deep emotional drives which, once touched, move people to sell themselves.

What That Means for You: *True relationship begins with the sharing of deep emotion*; trust builds quickly in true relationships; old school selling actually loses more sales than it makes, is energy draining and is only momentarily satisfying. Inspired sales flow easily, give energy, and create deep feelings of satisfaction that literally last forever.

It's about MORE than MONEY

You want to make sales to make more money. But, it's not money that is driving you. It's the emotions you have attached to money that are the driving force. Money in itself is neutral. It has no emotion; it has no meaning. It is just paper, or a number in a bank account. *Your drive for money is the drive to satisfy deep, visceral emotions.* You want to feel better; you want to grow personally; you want to achieve; you want peace of mind; you want joy, good health and happiness; you want to take care of your family, the community, your church or your synagogue.

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Once you understand yourself in this way, you can begin to see your clients with a *greater sense of reality and understanding*. You and they are no different. Percolating in every human being are the same desires, the same wants and needs, the same visceral emotions that drive them. And, how could it be any other way. It is the same inspiration that lives in all of us. Sure, the expressions of that inspiration are different. Some may be mainstream and easy for you to relate to or accept; others may be quite difficult to take in or rub you the wrong way. No matter. In the mind's eye of each one of us, *the same core pursuits emotionally drive us into action*.

It's the EMOTION that Drives the Sale

You ask, how do I make more sales? The answer doesn't lay in learning more closing techniques or stock answers to objections. The answer lay in your ability to find your inspiration and your client's inspiration and then *let those deep emotional drives reconfigure your client's finances*.

You can show the greatest plan in the world, but if you and your client are not inspired by it, connected to it emotionally at the deepest levels of your being, then nothing will happen. A "think about it" simply means that there is no inspiration, no visceral emotional drive to change, and, of course, no sale!

The Nitty-Gritty

The secret to releasing deep emotions lay in a simple series of questions which, like an onion, peel away the layers of mistrust that cause people to hide from you and not be straight with you. These are not your old-time questioning or probing techniques; these are techniques which allow people to feel safe and, in that feeling of safety, share with you what's really going on. ***We will show you a higher road to understanding*** both yourself and your clients which, in the end, makes sales feel like cherry picks and your life as a financial professional full of meaning.

Messages from the Front Lines:

“I’ve always been a numbers guy. Now I’m a numbers guy and an emotions guy which, to be real honest, scared the daylights out of me. But I’ve discovered emotions are the keys to making sales and getting appointments which, by the way, I am getting, and more of them. This is not old-school anything and it really works.”

—Randy H., Illinois

- Section IV -

Your World

What They Sold You: Go after what you want; always be closing; ask for the appointment more often; probe to find hot buttons; never give up.

What They Missed: The world works in reverse. Current methods of sales and marketing actually create more problems than they solve.

What That Means for You: You work harder but get less results; you are drained at the end of the day; clients hide during sales calls; you get blindsided and lose sales you thought you were going to get; you aim and shoot at a target, but you get shot instead; *you find little satisfaction being on the hunt like a caveman in a modern-day world.*

You Try and Take On the World

You try to make your world the way you want it to be. But, things don't always work out the way you expect them to, do they?

You try and entice people to buy and they run the other way; you try and find hot buttons and your clients try and hide from you; you are honest and they lie; you tell your clients how poorly their current advisor is doing for them and they love him more; you join a marketing organization with lots of promises only to

Section IV – **Your World**

find empty slogans; you spend money on marketing but your returns are going down; you think the next marketing program is the silver bullet you've been looking for and it turns out to be the worst dud you ever had; the more excited you get about your client's plan, the more objections they throw your way.

The World Works in Its Own Way

You have been taught that the world works a certain way. The truth is that you've got it exactly backwards—*the world works in reverse to what you would expect*. This is a hard lesson to learn. We all want to think that we get it, that we understand that we are wiser as we get older. But, until you learn that the world works exactly opposite to what you think, you will keep going around in circles, chasing your tail and being disappointed.

Do you want to have more clients? Then you must disqualify them *faster!* Do you want to know the reality of the relationship between your client and a competing advisor? Well, just *send your clients back to their current advisor!* Do you want to make more sales? Then *stop* selling! Do you want to have fewer cancellations? Then try and *give back the contracts* at the end of the sale! Do you want people to respect you? Then *make yourself smaller, more humble!* Do you want to increase your return on investment? Then spend *more* money, not less! Do you want to earn a new prospect's trust? Then tell them *there is no reason that they should trust you!*

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You need to go backwards to move forward. If you push people away, they come running; if you go negative on them about your product, they go positive; if you tell people your product is probably not for them, they will say it is. And so it goes. The world is simply not a straight line that makes sense. It, like your golf swing, is counter intuitive. If it feels good, it's probably wrong.

The Nitty-Gritty:

In our system, when the train leaves the station you receive ongoing, front lines coaching for the entire journey. We recognize that seeing the world differently takes a little practice and support. We'll provide reminders and debriefings via our industry-leading distance learning center, ongoing weekly webinars, personal coaching calls, monthly minutes, and learning events. We'll stand with you ***shoulder to shoulder, in the trenches, with the camaraderie and support*** that everyone has promised you, but that you have rarely received.

Messages from the Front Lines:

"If I picked one thing I learned from Steve that changed my life as a financial professional and as a person, it's that the world works in reverse. I can't begin to tell you what this means to me and my business. I have more fun, get more respect, have more self-respect, and my business is up from 3 million to 16 million in less than 2 years. What more can I say!"

—Tami S., California

- Section V -

Your Marketing

What They Sold You: You need to get in front of more people.

What They Missed: “More” is not always “better.” Marketing for “less” is actually more efficient and more lifegiving than trying to market for “more.”

What This Means to You: You may make more money or get an artificial ego boost about yourself by adhering to *the old ideology that “more is better.”* Traditional marketing may move you ahead in the material world, but the price you pay in terms of your energy drain and your quality of life, over and above the dollars and cents you spend, are far more than you either bargained for or realize.

MORE Prospects, or BETTER Prospects?

The overriding question that I get from financial professionals is, “How do I get in front of more people?” The word “more” is the operative word in this question. It’s interesting to me that I rarely get the question, “How do I get in front of more *qualified* prospects?” or, “How can I get people to get in touch with me when they’re ready to buy?” or, “How can I up the average sale of my business to increase my per-sale return on investment?”

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When marketing is looked at from the perspective of “more,” that normally translates into laying out more money, paying more for each appointment you get, trying more different things that seem to glitter and entice you, or just working more—putting in more effort in an effort to get more out.

The understanding that the world works in reverse leads us to a different reality, a reality where we actually prefer less, ***a reality that puts a premium on quality instead of quantity.*** Instead of requiring more effort that drains us every day, this new reality requires less effort *and* infuses us with more energy at the end of the day than we had at the beginning. In my world, less means more, a lot more!

You know that trimming the tree produces a bigger tree. But, when you are giving a talk to a group of people whose dinner you are paying for, or a client who has a lot of money, ***it goes against everything within you and what you’ve learned*** to trim that tree, to invite people to *not* make appointments or to *not* buy from you. In those moments, our ancient caveman hunter-gatherer personality kicks in, and off we go to the chase. And chase we do, until we are either exhausted or until we get the kill that excites us enough to go on the hunt again.

YOU Possess the Power to Choose

Suppose you could see one person a day with a 90% chance of that person buying from you instead of four or five people a day with a much less chance of doing business? Which

Section V – **Your Marketing**

choice immediately, without question, appeals to you?

Marketing for more will not deliver those results.

I know your current marketing efforts are bringing you business. But, that's not the question, is it? The real question is how you want to be in this business; how what you do impacts you, your family, your health, and your life.

Remember, it's never about the money. Marketing to make more money misses the target and creates many of the issues that you are trying to solve. There is a whole different world of marketing out there. If you would drop your old ideas about marketing and what you've been taught about it, a new world will open to you.

The Nitty Gritty

We have tested and perfected four levels of marketing that encompass over ***twenty different proven marketing opportunities*** that fit your budget, your personality, your style, and which carry our exclusive and differentiating message. Along with creating a real marketing plan with you, we continually debrief and coach you based on the responses in your market. Then that plan is tweaked to improve performance and increase profits.

Messages From the Front Lines:

“This is a very simple business when you see it clearly. But, unless you have the right support and team up with people that have clarity of vision to help you open your eyes, you won’t see it clearly and you’ll struggle year in and year out. My marketing is now running like a well-oiled machine. Last year, 85 sales came from referrals alone. We are now at 22 million and continue to go up.”

— Roy L. Pennsylvania

- Section VI -

Your Selling

What They Sold You: Selling via manipulation—trial closes, hot buttons, closes, handling objections.

What They Missed: The world has passed this method by. It is old, stale and inefficient.

What This Means for You: You put yourself at a disadvantage every time you are in front of a client. Since you don't have *a system with a predictable result*, you put yourself at the mercy of your clients. They gather the information they want without any commitment to you. They put you through your paces and then tell you they will give it some thought. You make sales, but you work too hard and lose too many. Why? You are using tools built for the 1800's in the world of 2011.

A Habit is NOT a System

You think you have a selling system, but you don't. If your selling system were a true *system* it would have a predictable result. In actuality, *your selling system is a hit and miss affair* that has at its roots a kind of thinking that belongs in a culture from over a hundred years ago. It promotes behaviors rooted in your ancient memory—embedded in your DNA—which motivate and excite you to go out and hunt and kill.

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Your selling mimics these ancient feelings, and every day you wake up, dress for success, go out to hunt down a prospect to lure into your office so that you can then go for the “kill” via your manipulative probing and closing techniques.

You are *Homo Sapiens*, NOT *Neanderthal*

While old school selling works, it is cumbersome and outdated. It creates more problems than it solves. It is a round peg in a square hole. Because it is not a true system, you don't know what's going to happen during the sales process or at the end of the sale. You go for the close and then keep your fingers crossed under the table because, at that point in the process, *you have lost all control* of the sale—the power has shifted into your client's hands. When your client decides to “think about it,” you jump into your neanderthal repertoire of handling objections and stalls. *Then you chase*, and keep chasing until you either run out of energy, or the client simply runs out on you.

Think about it. Today's society is totally different than the society in which traditional selling was conceived and developed. Today's world is far more complex. Attitudes are different and psychology is more understood. Old world selling is based on a *hierarchical mentality which basically said “father knows best.”* It was a time when you went to a doctor (or any other professional), they told you what to do, and you did it. Today, *telling* has been supplanted by *listening*. Instead of selling clients, *clients sell themselves*.

Section VI – **Your Selling**

Plans become a collaborative effort instead of the financial professional's unique design; the caveman hunt and kill mentality has been replaced by modern-day thinking, much like old cars have been updated with modern technology.

You Are How You Sell

The way you sell is a perfect reflection of who you are. The old adage *“know thyself”* is never more apparent than in a selling session. If you want to see yourself, just look at how your clients are reacting to you. They return what you give. They pick up on how you inspire them (for better or worse) and then, like chameleons, they give it back to you. If you get a lot of detail questions, I can assure you, you are a detail person; if you get clients who can't make decisions, I would bet that you can't make decisions either; if your clients are hiding from you, there is no doubt in my mind that you are hiding from them. The fact is, our profession of selling is an exercise in learning about yourself and then taking advantage of that learning to grow as an individual and as a human being.

The Nitty-Gritty:

Our selling system is just that, a real system with predictable results. *This system is built to perform.* Used properly, it will get clear “no” or “yes” decisions from your clients, eliminate think about its, neutralize objections, disqualify poor clients in the blink of an eye, identify other advisor relationships that may get in the way, and, do all of that while you sit back, relax, and let it do its work. Moreover, your learning curve is

accelerated via the coaching and training we provide. In a sense, when you use our system it is like having the delivery capability, resilience and dependability of a FedEx working for you.

Messages From the Front Lines:

“I used to be an old-school, product-focused (annuities), always-be-closing salesman. Steve’s system has changed all that. Now, I never chase a client; I don’t waste time; I sell multiple products (my life insurance business has never been better); and my clients do most of the selling to themselves. It’s hard for me not to fall back into my old stuff, but the constant coaching keeps me on track.”

— Tom F., Illinois

- Section VII -

Your Business

What They Sold You: How to get more leads.

What They Missed: How to build a real business.

What That Means for You: *You must start over every day* and either spend more money, work harder, or both, to do better financially.

If You BUILD It, They Will Come

How much business are you doing? How much do you want to do? Why can't you seem to take it to the next level? How come nobody seems to have the answers?

The answers to these questions are all around you—but the manual for marketing, selling and business building that you are using was written for a different time, a different place, a different kind of people.

And that's just the beginning. That's all about the world you live in. How about what is living in you? *Are you building a business or are you just chasing another lead?* A real business has sustenance in different markets and economic environments. If you are just chasing leads, then you are only as good as your next lead. Your fortune and your spirits will rise and fall with the quality of your last lead and the length of time between sales.

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We all would like to have a firm foundation under our feet; to live a more predictable life, in a more predictable world where we can feel that we are being supported instead of being run ragged by trying to figure out each step and never knowing exactly what to do. *Imagine getting up in the morning and having your business support you;* deliver appointments to you; make sales for you; create peace of mind, stability, high self-esteem and satisfaction within you. That's what having a *real* business is like.

Real Businesses Require REAL Business Plans

Do you have one? Has anyone coached you and helped you build one? Who have you determined is a real ally for you that you can confer with, celebrate with, brainstorm with, share deep emotions with? Who can align themselves with your personal inspiration and help you magnify and accelerate it into something of real substance and enduring rewards? You see, finding your next lead will feed your stomach; but *building a real business will feed both your stomach and your soul.*

The Nitty-Gritty

Beyond your marketing plan is your business plan. We will work with you on building a business plan that, of course, addresses your business, but also addresses *how to accomplish your personal and family goals.* You are assigned a personal account executive trained to assist you in building your business and building business plans. Your

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account executive is part of a bigger team that is dedicated to making sure that you never feel alone, unsupported or insignificant.

Messages From the Front Lines:

“I feel ridiculous admitting this, but I never had a business plan and I used to feel like I was starting over every day. I think I’m a pretty smart guy, but when it comes to building a business, I realized that I had a lot to learn. Finding Wealth Financial Group turned my business (and my life) around. Now my business works for me and I have more free time. I am meeting my goals and growing every year. This is the happiest I have ever been in this business.”

— Norman R., Arizona

- Section VIII - **Your Life**

What They Sold You: Mechanical strategies you copy and regurgitate like a machine, ultimately deadening you and your spirit.

What They Missed: Inspiration that, in each moment, enlivens you and all that you touch, ultimately bringing personal growth and higher consciousness.

What This Means for You: If you keep doing what you're doing, your future is already written. By tapping into what inspires you—what really makes you tick—*your future is yet uncreated and unlimited.*

More Inspiration, Less Perspiration

What inspires you each day? With each breath you inhale energy and then put that energy to work for something. Look around you at what you've built and take stock of what you've accomplished. Think of all the things that have deep meaning to you, the things that you love. Remember the struggles you have overcome, the challenges you have faced, and the celebrations you have had. *This is your journey.* This is a result of what your life energy has created. This is your life.

Section VIII – **Your Life**

But now, right now, in this and every moment, *you stand on a precipice of choice*. The past is the past, but your experiences of the past impact you now, in this moment. They push you, sometimes knowingly, most times unknowingly. The future holds your hopes, dreams, goals, and the satisfactions of your life. These, in this moment, are pulling at you, tugging you to go this way or that.

What will you do next?

Will you choose a future based on the push of the past, a future which is the result of doing the same things, perhaps cloaked in different garb, but still, the same things? If you do, then that future is already written and it is your default future.

Or, will you dig deep inside yourself, recreate yourself so that you and those you touch can enjoy a more invigorating, satisfying future full of peace of mind, happiness, the ability to reach beyond yourself, to manage difficulties in a healthier way, and, of course, a future filled with personal and financial wealth?

This is the precipice that you, I, and all human beings stand on each moment of our lives as we choose what we will do in the next moment, and the moment after that.

Your clients, like them or not, respect them or not, are just like you, and you are just like them. From this viewpoint, the viewpoint of inspiration in the moment, everyone is equal and *everyone has the opportunity to make better and more life-invigorating choices*. If you can't help yourself in this moment

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and just mechanically proceed as you've always done, how on earth can you inspire and help your clients?

The Nitty-Gritty:

Anyone can offer you a bevy of programs and ideas on how to make money. Putting those programs and ideas together into a meaningful whole is a jump to a higher level of thinking and support. All of our marketing, selling and best practice programs are integrated to maximize brand, relationship, respect, differentiation, efficiency and your ROI. ***A braintrust of front lines experience***, working diligently to keep you ahead of the market and in the groove, is constantly available to you at many different levels and in many different formats. Instead of being thrown into a mass of confusion about what to do next, you will wake up every day full of confidence, knowing just what to do and how to do it.

Messages From the Front Lines:

"I could never find what I really stood for and what separated me from the rest of the pack until I joined Wealth Financial Group. I have found their philosophy and materials to have real meaning and impact on my clients and my business. I have been coached on how to be perceived differently and with greater value. While I've always read about differentiation, up until now, it's just been a lot of words. Now, it's a lot of meaningful action delivering a lot of business."

Mark R., Texas

- Section IX -

Your Mission

What They Sold You: Money, business building, lead generation, old selling techniques and how to get more.

What They Missed: Identifying and working within your core motivations; infusing every business activity with that perspective, drive and energy.

What That Means for You: Everyone is on a mission of some kind. That mission has a deeper meaning for you that is *neither being addressed nor nurtured* by our industry today. Yet, the nurturing, growth and implementation of that mission can bring you more rewards than you ever thought possible, both financial and personal.

Join the Service

Your business, my business, all business—when all is said and done, I believe is all about service. My role is to serve you; your role is to serve your customers; their role is to serve their families and their communities. And so it goes, person to person to person, *an unending chain of mutual support*.

In my world (and, actually, I believe in yours too), the inspiration to serve has nothing to do with making money.

Why **99%** of All Sales & Marketing Systems **FAIL**

Yes, money is important: it has a specific place and purpose, and it needs to be attended to. At the same time, while a lot of money can and is being earned, for those who look deeply into themselves and are growing personally, it is the *fallout* of their mission, *not the goal*.

Mission: POSSIBLE

Many people have told me that I am too philosophical, too naïve, or that I could make more money. They tell me that I will never accomplish what I've set out to do—**change our industry**—but that's the mission I've set out to achieve.

It saddens me greatly to see the level of mistrust that is held by our clients towards financial professionals like you and me, towards the financial institutions of the day, towards the products and plans we recommend. Trust, for us, is scarce and hard to earn. It shouldn't be that way!

So, what is your life's mission? How does it feed into your business vision? And how does it inspire you in each moment of your life?

The Nitty-Gritty:

What do you want—to make money, to boost your ego, to get a lot of things, to feel powerful, to win? Sure, that's all part of it. But what do you *really* want? **What's burning in your soul?** What drove you to the hunt? We are dedicated to making you more money for sure, but, we are more dedicated to making you into a fulfilled person.

Messages From the Front Lines:

*“I’m a pretty spiritual person with a big vision for my service and business. Finding a group that honors who I am and is out for me and my goals instead of their own has been enriching and rewarding. I’ve not had that experience in other marketing organizations, where they have either not really cared, or tried to button-hole me into one type of thinking. This **is** the best.”*

— Ray E. Arkansas

Conclusion

Every moment carries within it a choice. You could choose to keep doing what you have always done: stay in your comfort zone to live with the distasteful feelings of underachievement. This is what I call *the default future*, a future based on and pushed by the *past* you. Or, in the same moment, you could choose a more unknown direction which, although seemingly threatening and uncomfortable, is also exciting and fresh. This is what I call the inspired future, pulled by the vision of who you *really* want to be and the mission to which you are dedicated.

I am seeking to work with people who want to grow personally; who want to truly do the very best for their clients; who want to hang around with smart, productive, magnetic people on the same wavelength; people who understand that our industry has sunk to a new low in the eyes of the consumer and who want to be part of something greater than themselves in redesigning and inspiring a new future for the industry, themselves, and their clients.

I invite you to join with me on this adventure.

You Stand on a Precipice



Now that you've finished reading *Why 99% of ALL Sales and Marketing Systems FAIL and What Every Advisor Needs to Know*, take a moment to ask yourself the following questions:

- Do I want to grow and become *more satisfied with my business and with myself* as a person?
- Do I want to *understand and satisfy my clients*, where I and they receive *rewards far beyond money*?
- Do I want to *build a better, more intelligent business* which will help *reshape our industry*?
- Do I want to work *with* an organization of like-minded individuals who will *stand behind me and support me* in attaining *my highest business and personal goals*?

If you answered "Yes" to just one of these questions, please contact **Bill Senese** at **888-333-7771** to further discuss how we might work together, and to request our informational kit.

We look forward to hearing from you!

If you were just
flipping through this
booklet and landed
on this page,
**BE SURE TO READ
PAGES 22 – 24!**
