

# ATTRACT THE AFFLUENT

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GENERATE A STEADY STREAM OF IDEAL CLIENTS  
USING SEVEN SIMPLE STRATEGIES

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JOHN J. BOWEN JR.

AN INDUSTRY INTELLIGENCE REPORT FROM CEG WORLDWIDE

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## Setting the Stage for Success

As a successful financial advisor, you know that the right affluent clients are the lifeblood of your business. But finding a steady stream of ideal affluent clients isn't easy.

And for good reason. Affluent clients are *busy*. The vast majority are C-level executives, skilled professionals or entrepreneurs who have worked hard to create their success.

What's more, affluent investors are bombarded with advertising. In fact, some studies show the affluent are exposed to as many as 5,000 marketing messages a day. So they've learned to ignore typical marketing tactics like direct mail, email, print and online advertising.

On top of that, affluent investors don't have a very high opinion of our profession. In fact, one study found that four out of five affluent clients would consider switching financial advisors if they knew of a better option. To put it another way: *The only reason 80 percent of affluent clients don't fire their financial advisors is because they don't know where to go.*

But there's a silver lining to this dark cloud of client dissatisfaction: Now more than ever, affluent clients are seeking someone who can help them make smart decisions about their money. And that's where you come in.

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## The Power of the Platform

### Seven Key Components to Attracting Affluent Clients

As you may know, there are over 460,000 financial advisors working with individuals in the United States. But out of those 460,000, only an elite few earn \$1,000,000 or more in net income. And over the past decade, we've had the privilege of coaching many of these advisors to even greater levels of success. We've also conducted in-depth studies of these elite advisors to find out what they do differently from the other financial advisors. And what we found was surprising.

Almost without exception, every one of these elite financial advisors uses a few key strategies to create a *platform* that attracts their ideal affluent clients. And here's the good news: Almost any successful financial advisor can use these strategies to do the same.

These strategies don't rely on traditional marketing or advertising methods. Instead, they use your personal story to help you position yourself as the #1 expert in your market. They leverage your existing relationships to increase introductions to new affluent clients. And they use technology to make you ubiquitous in your local market.

Alone, each of these strategies can rapidly increase your AUM and net income. They help turn skeptical prospects into "raving fan" clients. And they can dramatically improve your quality of life. And when you use their strategies together, you can create exponential growth in your wealth management practice.

In fact, when you use these strategies in the right way, you can easily attract an average of one new affluent client per month. These strategies work quickly, too—in as little as 90 days. And you can start putting them into place immediately.

So what are these client attraction strategies? Well, first there's...



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## Affluent Client Attraction Strategy #1

### Perfect Your Personal Story

Has this ever happened to you? You meet with a prospective affluent client for the first time. You have a great discussion about how you can help achieve his or her biggest financial goals. By the end of the meeting, you're sure that this person is ready to sign on and become your newest client.

But then you hear the most dreaded words in face-to-face sales: "Well, I need to think about it." And then you never hear from this prospective client again.

So what happened? Well, chances are it didn't have anything to do with you or your services. In fact, you could be the best financial advisor on the planet and still get the same results.

Here's why: As financial advisors, we tend to be logical, left-brain thinkers. We like logical arguments, organization and numbers.

And those are great traits for a financial advisor. But most people are right-brain thinkers. And as right-brain thinkers, they tend to view emotional connections as more important than logic and numbers. In fact, studies show 84 percent of affluent clients want to connect with you emotionally first...and then use logic to justify their desire to engage with you.

And that's where the power of your personal story comes in. You see, the right personal story...

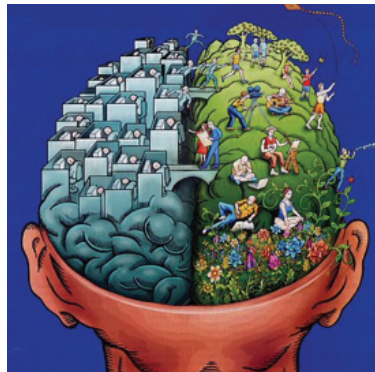
#### **Attracts the right affluent clients to you**

With the right personal story, you'll easily attract your ideal affluent clients. Now, I realize that may sound a little too good to be true. But there's a logical reason why your personal story can have this effect.

You see, when you have a powerful personal story, it resonates with the right clients. That's because something in your story—sometimes a seemingly small detail—connects deeply with the listeners. And when they feel that deep emotional connection, they've already decided to do business with you.

#### **Immediately creates trust**

Having a powerful personal story is also a fantastic way to create trust and build rapport. And once your prospective clients feel that sense



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of trust, it's easy to switch to logical explanations of your skills and services. And since you've already connected with them on an emotional level, all you have to do is show them how you can help them reach their goals.

**Establishes the foundation of your vision**

Most important, a good personal story explains to your prospective clients who you are

and why you do what you do. It communicates your passion for helping clients reach their biggest financial goals. And it shows affluent investors why you're so committed to their success.

Here are some examples of powerful personal stories that successful financial advisors like you use to attract affluent clients:

[www.cegworldwide.com/profiles-in-success](http://www.cegworldwide.com/profiles-in-success)

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## Affluent Client Attraction Strategy #2

### Power Up LinkedIn

When you have the right social media strategy, you can show clients why you're the best advisor for their unique needs. You can explain your competitive advantage and stand out from the crowd. And you can create "expert status" and get affluent prospects lining up at your door.

Unfortunately, most social media marketing information out there is next to worthless. And the rare tidbits of good information may not work for financial advisors. That's why I decided to develop a new way to leverage social media—designed exclusively for financial advisors who want to reach the next level of success.

#### **Nine ways to power up LinkedIn**

Picture what happens when your current affluent clients refer you to their friends. Like most affluent investors, your new referrals have worked with financial advisors before. And like many affluent investors, their experiences were not good.

So even though you've been recommend by people they trust, your new prospective affluent clients will do a little research. And what do you think they do before anything else? Go straight to Google.

If you're like most financial advisors, they'll quickly find your company web site. They may stumble across your resume or bio. And they're almost certainly going to find your LinkedIn profile.

And that's why optimizing your LinkedIn profile is so crucial. Unlike your company web site, LinkedIn gives you the ability to customize your profile to target your ideal affluent clients. Even better, it gives you a platform to connect with those clients. And you can even leverage LinkedIn to help create expert status in your niche.

But to attract your ideal affluent client, you need to optimize your LinkedIn profile in the right way. You need to...

#### **1. Upload a professional photo**

Like the old saying goes, "You never get a second chance to make a good first impression." Think of LinkedIn as your online business card. Would you put a picture of you in a casual shirt and jeans on your business card? Of course not. Use a professionally taken headshot that makes you look like the professional you are.

#### **2. Create a compelling headline**

Your headline should communicate some-

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thing about the value you provide to your clients. And it should make you stand out from the crowd. Ideally, it should quickly summarize who you are, what you do and why your approach is unique.

**3. Decide which personal information to include**

Before you fill out your LinkedIn profile, ask yourself: “If I were in my ideal affluent client’s shoes, what would compel me to contact this advisor?” Do your high school activities matter? Probably not. But your personal interests may be a way to connect with a prospective client.

**4. Hide skills and expertise endorsement**

This is one of the only drawbacks of LinkedIn. Even though they may be very general, compliance officers may consider LinkedIn endorsements to be testimonials. It’s best to simply hide them to avoid any compliance issues.

**5. Personalize and leverage your profile with the right apps**

LinkedIn apps like SlideShare give you the opportunity to leverage your personal story and create powerful emotional connections with prospective affluent clients before you meet with them face-to-face. In addition, apps like ReadingList by Amazon give you

the chance to connect with your clients on a personal level through shared interests.

**6. List your current position and at least two past positions**

Just like a resume, you want to show a range of experience and use your background to your best advantage.

**7. List your formal education**

Since we can’t list our skills, we can do the next best thing: We can list our education and credentials. This can be especially useful if you have any specific training or designations that may appeal to your target market.

**8. Complete additional information, such as web sites and groups**

I’m always surprised when a financial advisor’s profile doesn’t link to his or her web site. That’s a huge missed opportunity to get clients to contact you directly. In addition, listing your LinkedIn groups provides clients another way to connect with you on the site.

**9. Complete the “Contact me” section**

This is one of the most common mistakes I see advisors make. They may have a great profile that gives prospective affluent clients plenty of reasons to get in touch with them. But they neglect to give those prospects contact information like a phone number or email.



Don't make this mistake. You need to make it as easy as possible for prospective clients to contact you immediately. If you don't, all of your hard work leveraging LinkedIn could go to waste.

To give you a better idea of what your LinkedIn profile should look like, use this simple template:

**The #1 Coach For Top Financial Advisors**

**CEG**  
worldwide LLC

### LinkedIn Profile Template

Outlined below is a sample LinkedIn profile template with guidelines to follow to develop the most impactful profile possible. The goal of your profile is to create credibility and trust with your connections. Try to limit your profile to 2,000 characters.

Joe Smith is a wealth manager at Total Wealth Solutions. He focuses on providing wealth management solutions to attorneys in the San Francisco Bay Area. Together with his partners, he helps affluent clients address their five biggest concerns: preserving their wealth, mitigating taxes, taking care of their heirs, ensuring their assets are not unjustly taken, and charitable giving.

Joe founded Total Wealth Solutions in 1995 and now serves 200 clients who have entrusted him more than \$500 million in assets. He uses a consultative process to gain a detailed understanding of his clients' deepest values and goals. He then employs customized recommendations designed to address each client's unique needs and goals beyond simply investments.

Successful individuals and families work with Joe to:

- Develop and implement a comprehensive wealth management plan to help them reach their financial dreams.
- Make smarter decisions in today's uncertain political, economic and social environment.
- Obtain an independent second opinion from a top financial advisor in their community.

Previously, Mr. Smith spent eight years as a financial advisor with Merrill Lynch. He also served as CEO of Guardian Capital Management. Last year, he was recognized as one of the top financial advisors in the San Francisco Bay Area by *Barron's*.

Joe is a widely recognized leader in the San Francisco financial advisor community, serving on the local CFP board along with other advisory associations. He hosts a weekly radio show on investing and also writes a monthly column for *Investment Advisor* magazine. He has written three books that have appeared on the Amazon Top 100 list.

The first paragraph should focus on your current role as a financial advisor and how you help clients reach their goals.

The second paragraph should focus on your process and your successes. Include numbers if possible. Avoid client testimonials.

The third paragraph should be the visual break that draws the reader's eyes. Focus on why clients should work with you.

The fourth paragraph establishes your credibility. Include previous work experience and any awards.

The last paragraph should include personal information to help build trust and make you approachable.



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## Affluent Client Attraction Strategy #3

### Drive Second Opinions

We all know that client referrals are a great source of business. But let's be honest: Most of us don't ask for them as often as we should. In fact, many advisors never ask for referrals at all.

That's a big mistake. The right referral strategy can generate a steady stream of introductions to pre-qualified affluent prospects. In fact, we have advisors in our coaching program growing 20 percent per year just from affluent client introductions.

Furthermore, when we surveyed financial advisors who use this strategy, the top advisors reported they got at least one referral per year from their best clients. Some get an average of five referrals from every top client—every year! Just imagine what that would do for your bottom line.

But the key to creating a steady stream of affluent client introductions isn't constantly pestering your clients for referrals. In fact, you shouldn't ask your clients for referrals at all.

Instead, you should offer them a valuable service that gives them a reason to recommend you to their friends, family and colleagues. And the best way to do that is with a second-opinion campaign.

The key to making this strategy work is reframing the referral process. Rather than ask

for a referral, you offer your clients a way to help the people they care about to make smart decisions about their money.

Here's a sample of the second-opinion offer I use with my coaching clients:

"I want to offer you a service that we provide to our best clients for the people they care most about.

"With all the complexity and volatility in today's financial markets, many investors are actively considering switching financial advisors. They're unsure of what to do now. Are they well positioned to stay with their current financial advisors or should they switch financial advisors? And if so, how can they find the right one?

"To help these people that you care most about, we now offer our second-opinion service so that they can make informed decisions.

"In this service, we provide a second opinion. We take them through the same experience you had with our discovery process to get very clear on where they are now and where they'd like to go. We'll examine any of the gaps that need to be filled and, if they're in good shape with their

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current providers, we'll let them know. Or if it's more appropriate for us to work with them, we'll begin that process.

"As you know, we work only with clients for whom we can have a major impact. If they should consider switching financial advisors and we're not a good fit, we'll be happy to point them in the right direction for a financial advisor who can work with them more effectively.

"Whom do you know who would most benefit from our second-opinion service?"

When should you use this offer? Well, we have our coaching clients start right away at the first commitment meeting with a new client. And they continue to make this offer at the end of every face-to-face meeting with their cli-

ents. That's one of the reasons why many of our coaching clients see their business grow by more than 20 percent every year.

But you don't have to limit your second-opinion campaign to client meetings. With a little creativity, you can adapt this script into an email...web site copy...even video. The sky's the limit.

A powerful personal story, smart social media strategy and the second-opinion campaign are enough to kick-start anyone's wealth management practice. But if you're really serious about taking your business to the next level of success, you need to create maximum leverage. And that's what these next strategies are all about.

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## Affluent Client Attraction Strategy #4

### Create Your Webinar & Live Presentations

Now, you may be thinking “Webinars? John, I don’t know how to do that!”

And I completely understand. If you had told me a few years ago that I’d be creating multiple webinars each month, I’d have thought you were a little nuts. And if you told me that I’d be generating 42 percent of all new clients from those webinars, I’d have probably smiled and walked away.

But the reality is you already have everything you need to create a successful webinar. After all, a webinar isn’t much different from the face-to-face presentations you do now. The only difference is that you can record a webinar once and use it to attract affluent clients over and over again. It’s an “evergreen” asset that can have a profound impact on your wealth management practice.

#### **Seven keys to a great webinar**

The first step to a great webinar is the right topic. Now, that may sound obvious. But you’d be amazed at how many financial advisors simply don’t know what’s really important to affluent clients.

Over the past decade, we’ve surveyed over 10,000 affluent investors to find out what they really want. And the answers may surprise you. Our research shows that affluent clients have five areas of concern when it comes to wealth management.

1. Wealth preservation
2. Tax mitigation
3. Taking care of heirs
4. Protecting assets from being unjustly taken
5. Charitable giving

Now, here’s the great part: Right now, you know enough about any of those topics to create a great webinar. All you need to do is organize your information in a way that’s engaging and informative. First, you need to...

**Gather your information.** As financial advisors, we’re already experts in wealth management. But it’s always a good idea to research your topic thoroughly. And here’s the key: Your research should focus on what your target audience already knows about the topic. This lets you understand where they are now and the best way to cover the material.

**Organize your thoughts.** Next, you want to thoroughly organize your research and start creating the framework for your presentation.

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And that brings us to the next step:

**Develop logical categories.** Just like a live presentation, a webinar has to engage your audience. The first step to doing that is making sure you have a relevant topic. Then you want to make sure your presentation flows logically from one idea to the next. If it doesn't, chances are you'll lose your viewer at some point.

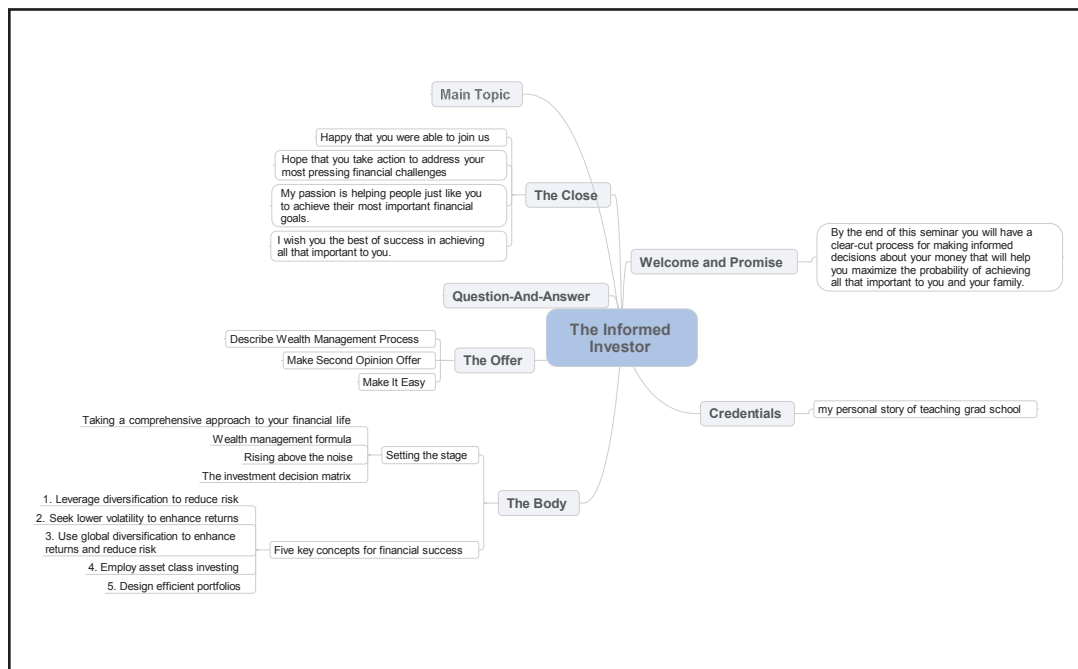
However, there's an easy way to handle both of these steps: mind maps. I use a program called MindJet, but there are plenty of great options out there. At the bottom of this page is an example of how I organize my webinars.

**Create your slides.** Finally, it's time to build the webinar itself. And here's the good news: You don't need any expensive software. In fact, I build all of my webinar decks using PowerPoint.

Since you've already done all the hard work, this step should go quickly. However, I strongly recommend having your assistant handle the actual PowerPoint build-out. You can also out-source it to a good graphic designer.

**Craft a catchy title.** This is a crucial part of creating a great webinar—and one of the most overlooked. If you're going to grab a prospective affluent client's attention, your webinar needs a catchy title. Your title should communicate the benefits of viewing the webinar in a way that's engaging and intriguing. Ideally, it should stop your prospects in their tracks.

These titles don't need to be long. For instance, this webinar's title is just three words: Attract the Affluent. When you read that title, you know exactly what the webinar is about



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## Affluent Client Attraction Strategy #5

### Inspire with Your Presentations

So far, we've talked about how to find a topic, gather information, create a clear, compelling presentation and make sure it resonates with your target market.

That gives you the main body of your webinar. Now it's time to build the presentation itself.

A great presentation should have six parts:

#### 1. Welcome and promise

Like any presentation, you want to start on the right note. Make sure to welcome your attendees and thank them for taking the time to participate. Then explain what they'll get and how the information you'll share will help them make smart decisions about their money.

#### 2. Your personal story

Next, you want to connect with your prospects through your personal story. Now, you don't necessarily need to use your full story. In many cases, I use a condensed version of my story that focuses on my credentials while building an emotional connection.

#### 3. The body

This is what you built in the previous section—the “meat” of your presentation. Make sure you have a clear and logical transition from your personal story into your main topic.

#### 4. The second-opinion offer

As I mentioned above, your second-opinion offer isn't just for face-to-face meetings. It's also perfect for webinars or live presentations.

Since you've just given your audience a lot of useful, actionable information, they already view you as an expert. All you have to do is leverage your newfound expert status by offering them a chance to get a second opinion on their current advisor's financial blueprint.

However, it's important that you frame the second-opinion offer as a valuable (but free) service. And you need to make it 100 percent clear that you're not going to subject your prospective clients to a sales pitch. Finally, make it as easy as possible for attendees to take advantage of your offer.

#### 5. Question-and-answer session

After you've made your second-opinion offer, you want to continue to offer value to your attendees. You also want to demonstrate that you really are the best financial expert for their unique needs. And you want to give

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your prospective affluent clients a chance to interact with you one-on-one.

That's why I always recommend including a Q&A session in every presentation, especially after you make your second-opinion offer. A good Q&A solidifies your expert status, vividly demonstrates your skills and gives hesitant prospects another reason to consider raising their hands to explore working with you.

## **6. Closing**

Finally, you want to close your presentation effectively. Restate the benefits of the presentation. Create some energy and emotion around the concepts that you covered tying back to your personal story. And make sure you explain how these concepts will help your attendees reach their financial goals.

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## Affluent Client Attraction Strategy #6

### Finish Your First Ebook

I wrote my first book over 25 years ago. And it changed my whole career. Suddenly, I was an expert—not just in the eyes of my clients, but also in the eyes of anyone who read my book. And that “instant expert” status helped my partners and me build our RIA business to \$2 billion in AUM in about seven years.

Needless to say, it was an amazing experience. And the best part was that once my book was published, it continued to help me build credibility and position myself at the top of my market for years to come.

#### **Five steps to a great ebook**

Maybe you think you’re “not a writer.” Maybe you think you don’t have the time to write a book. Or maybe you’re just not sure about how to get started.

Well, here’s some good news: The truth is that almost anyone reading this report can write and publish his or her own book. In fact, I have coaching clients who have created their book and self-published it on Amazon in as little as 14 days. Yes, that’s right—14 days!

The key is having the right process. Here are five steps to getting your first book finished in just a few weeks:

#### **1. Leverage your webinar**

First, you don’t have to write the book from scratch. Instead, you’re going to turn your ex-

isting webinar into a manuscript. The great thing about this tactic is that you don’t really have to write anything. All you need to do is send your webinar recording to a transcription service.

And don’t worry. You won’t have to pay an arm and a leg to turn your webinar into a rough draft of your book. In fact, you can get your entire webinar transcribed for about \$60. And you can usually get it done quickly, sometimes in as little as 24 hours. My team and I use one at [www.rev.com](http://www.rev.com).

#### **2. Transform your rough draft in a working manuscript**

Now, a word of warning: No transcription service is perfect. Your webinar is just like a presentation to a live group. No matter how clearly you speak, some words will be hard to hear or jumbled. And that will show up in your transcription.

That’s why it’s important to think of your transcription as a rough draft instead of a fin-



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ished product. To create your book, you need to transform this rough draft into a polished manuscript. But don't worry—you don't have to be a great writer. In fact, you don't have to write a word if you don't want to.

If you love to write, go ahead and draft the manuscript yourself. It will take a little time, but you'll be able to really personalize the language and put your voice into the copy.

But if you're like me, you're probably not the best writer around. Frankly, I'm pretty sure my English teachers would all be shocked with the number of books that I've written.

How have I been able to do that? Well, the honest truth is I haven't written any books. But I've *authored* plenty of them.

All the ideas in my books are mine. But I've always worked with outside writers to take my outline and turn it into something people will actually want to read.

And you can do the exact same thing. Simply hand your "hired gun" the transcript of your webinar. They can edit, add to, and tweak the copy into a workable manuscript.

### **3. Graphic design**

The next step is to add some graphic elements

to your manuscript. These don't have to be fancy; in fact, simple charts, graphs and illustrations are best.

Of course, you probably don't want to handle this sort of thing yourself. I can't tell you how many hours I wasted over the years trying to find the perfect image for a PowerPoint presentation or Word document—let alone trying to get them to look "just right" on the page.

That's why I strongly recommend you let one of your team members handle creating any graphs or charts you need using Excel or a similar program. Then you can have them insert the graphics into the manuscript as needed.

### **4. Editing and review**

Now that you've had someone transcribe your webinar, draft your manuscript and design a professional-looking layout, you need to take one more step: You need to get your entire manuscript edited and reviewed for content, clarity and grammatical or spelling errors.

First, read through the entire manuscript yourself. This book is going to be your "representative." And you want to make sure your ideas are communicated clearly and in simple, straightforward language.

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Next, you want to get your entire manuscript checked for any grammatical errors, spelling mistakes or other overlooked blunders. Again, this isn't something I recommend you do yourself. Even if you love editing, it's simply too time consuming.

Luckily, there are a number of services out there that will edit your manuscript. My team and I use one called ProofreadNOW.com. They're fast, fairly inexpensive and extremely thorough. You can submit your manuscript through their web site. And in many cases, you can get it back—with corrections—in as little as 24 hours.

## **5. Finalize your manuscript**

Now it's time to finalize your manuscript and turn it into a client-attracting book. If you've followed the previous four steps, this should be very simple. All you need to do is make any corrections your editor red-flagged and do a final review of the document. If you're happy with the way it looks, you're done!

Assuming you already have your webinar finished, this entire process can take as little as two weeks from start to finish. Of course, it may take some people slightly longer—we all have clients to work with and businesses to run. But the key is to get started as soon as possible and create momentum.

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## Affluent Client Attraction Strategy #7

### Launch Your First Ebook

Now that you have your book done, you're ready to claim your position as the expert in your market. To make that happen, you need to promote your new book in as many ways as possible. And in today's information-hungry world, that's surprisingly easy to do.

Here are just a few ways to leverage your book and maximize your expert status:

**Leverage local media.** Twenty years ago, local media still had a monopoly on local news. Today, they're desperate for exclusive, locally focused content. And as a local financial expert with a newly published book, you're news.

Now, you may not get any clients simply because you're on TV or in the newspaper. But those video clips and printed quotes are incredibly powerful ways to build credibility. Just imagine the impact they will have on a prospective client visiting your web site for the first time!

**Leverage your webinar.** You can also use your book as a gift for anyone who attends your webinar. This adds even more value to the information you share on the webinar. And it boosts the credibility of everything you share with your prospective affluent clients.

**Leverage your clients, prospective clients and potential strategic partners.** This is a simple—and very powerful—way to use your new status as a published author. You can mail a hard copy of your book to your best clients as a gift. You can give your book to prospective affluent

clients at your first meeting. You can even use your book to build your professional network and generate a flood of new referral business.

**Leverage online video.** You can also use your new book along with a video of your personal story. You can create videos about the book itself and post them on your web site or on YouTube. And you can email these videos to current clients, prospective affluent clients and potential strategic partners.

**Leverage social media.** Earlier in this report, I told you how you could use LinkedIn to attract more affluent clients. Well, imagine if your LinkedIn profile also told those prospective clients that you're a published author. You could even include a link to Amazon so they can download your book right away. Talk about building massive credibility!

**Leverage your presentations.** If you do live presentations, you can use your book to entice more people to come. In this case, I think printed copies are best. Since they're meeting you in person, the impact of handing them a copy of your book is even more powerful. And when you combine that with the information you share in

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your live presentation, the book becomes a visible reminder of your expertise.

But don't worry—you don't have to print 5,000 copies of your book and store them in your garage. Thanks to Amazon, anyone can

print their book on demand. So if you have a presentation coming up, simply order as many as you need. Amazon will print each copy and deliver them to your doorstep. It doesn't get much easier than that!

### *The easy way to quick-start your affluent client attraction platform*

This manual gives you everything you need to build your own client attraction platform. But if you're a successful advisor, you're busy. Between working with clients, prospecting for new business and running your business, finding the time to implement all of these systems may feel next to impossible.

That's where our new Attract the Affluent coaching program comes in.

This intensive eight-week program is designed to help you quickly implement these strategies and start attracting a steady stream of new affluent clients in the next 90 days.

During this powerful coaching course, you get step-by-step guidance to launching your own client attraction platform. We'll break down everything in a clear, systematic way. And you'll have specific guidelines and goals to keep you on track.

You'll also get full access to Attract the Affluent Online—our private coaching portal with over 12 hours of detailed videos, examples of each strategy in action, and everything you need to get started building your client attraction platform.

And that's not all. As part of your Attract the Affluent membership, you'll get something I've never offered before: access to my personal team of marketing and implementation experts. You'll have the opportunity to ask them questions and get their help with any challenges that come up along the way.

What's more, you'll be able to use our private Facebook group to leverage the power of the mastermind and see what your fellow Attract the Affluent members are doing to make these strategies work in their businesses.

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***And when you join the Attract the Affluent coaching program, you'll also get...***

- **Three more ways to use social media to position yourself as an expert.** Simple tactics to get affluent prospective clients to view you as a trusted advisor.
- **What you must know *before* you share your personal story.** Little-known techniques that help overcome hidden objections ... and turn skeptical prospects into happy affluent clients.
- **The #1 concern of today's affluent investors.** HINT: It has *nothing* to do with increasing their wealth.
- **The dangerous (and expensive) mistake nine out of ten financial advisors make when working with affluent investors.** What it is and how to avoid it.
- **Three simple tactics that make your second-opinion offer even more effective.** These are easy to do, but they dramatically increase introductions to new affluent clients.
- **What affluent clients *really* want from their financial advisors.** The answer may surprise you.
- **Advanced mind-mapping strategies that uncover hidden opportunities most advisors overlook.** How to provide world-class client service in less time...with less effort...and better results.
- **Sixteen proven tactics to help you attract pre-qualified, ready-to-act affluent investors.** Just one of these can dramatically boost your income and AUM.
- And much more...

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## Bonus

### Two-Day Attract the Affluent Workshop

But that's just the tip of the iceberg. You see, as part of your tuition to Attract the Affluent, you also get a ticket to our two-day Attract the Affluent workshop in San Francisco in August.

During this intimate seminar, we'll help you put together your 12-month action plan. We'll work with you one-on-one to address any roadblocks or challenges you may be having. And we'll work together to help you implement these client attraction strategies in the most efficient—and productive—way possible.

And as part of your workshop, you'll also get the opportunity to perfect your personal story on video. You see, we're bringing in a special three-camera studio just for our advisors. We'll even edit the video for you and send you the finished copy. All you need to do is share it with your prospective affluent clients.

### ***The only affluent attraction system that guarantees results***

Normally, Attract the Affluent requires an up-front investment of \$10,000. But right now, you can try all of these proven strategies for just a fraction of that cost.

These are the same strategies that elite financial advisors use to create their success. In fact, I teach many of these strategies in our \$24,000-a-year flagship program, **Breaking Through**.

But you don't have to pay \$24,000 a year for these strategies. You don't even have to pay the full \$10,000 tuition for this unique coaching program. You see...

### ***We're going to invest in your future success***

Here's how it works: When you sign up for Attract the Affluent, you make an initial investment of \$3,000. You get full access to the entire eight-week coaching program, including Attract the Affluent Online. Then, once the eight-week program is over, you get an additional 18 months to implement these proven affluent client attraction strategies for yourself.

**The remaining \$7,000 of your tuition is contingent on your results.** As you sign up new affluent clients, you'll pay us \$1,000 each until the balance of our co-investment is paid off.

If for some reason you only sign up three new affluent clients during those 18 months, you only pay us \$3,000. If you sign up one new affluent client, you only pay us \$1,000. And if for some reason you don't attract a single affluent client, you don't pay us another dime.

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This co-investment strategy aligns our interests with yours. We're highly motivated to help you attract as many affluent clients as possible to earn back our \$7,000 co-investment. And of course, you'll never pay more than the \$10,000 tuition you agreed to—even if you sign up dozens of affluent clients.

### **For successful financial advisors only**

**But there is one small catch:** Attract the Affluent isn't for everyone. It's designed for experienced financial advisors who already know how to work with affluent clients. That's why we're limiting this program to advisors with a net income of \$200,000 or more.

In addition, this session of Attract the Affluent is limited to 50 financial advisors. That's why we're asking everyone who's interested to go through a two-step application process. We want to make sure every advisor is a good fit for this unique program—and that it's a good fit for you, too.

To get started, simply call our office at (888) 234-6991 and schedule your two-part Best Year Ever Consultation. During this private one-on-one call, we'll ask you where you are now. We'll find out where you want to go. And we'll create a customized mind map to help you find the best ways to bridge the gap and reach your biggest goals.

### **During your Best Year Ever Consultation, you'll also discover...**

- **What's your "Big Why"?** This simple system helps you create a clear and compelling vision of your ideal wealth management practice.
- **Key building blocks behind the success of the top one percent of financial advisors.** These critical strategies form the foundation of every highly successful wealth management business. Learn what they are and how to use them.
- **The #1 success roadblock that's keeping you from creating the business—and life—you really want.** HINT: It has nothing to do with goal setting, visualization or time management.
- **Your top three "must-do" tactics to dramatically accelerate your success in 2013.** Not even one advisor in 100 knows this information.
- **Discover your personal step-by-step plan to take your wealth management practice to the next level.** What to do first...what to do next...and what to avoid.



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After your first call, our elite advisor consultants will create a customized action plan based on your results. Then you'll have a second private call with one of CEG's elite advisor strategists.

During this call, your elite advisor strategist will show you exactly where to focus your energy for maximum results. You'll get new insights into your business to help find overlooked opportunities. And you'll get a detailed report containing your top three action items to reach the next level of success.

## **Risk-free offer**

Normally, this in-depth consultation is valued at \$2,000. But right now, you can get the benefits of your personal Best Year Ever Consultation complimentary.

If you're ready to start making this year—and every year—your best year ever, call my office at (888) 234-6991 and schedule your private Best Year Ever Consultation now.

There's absolutely no risk.

Just imagine what your business—and your life—will look like after you put these client attraction strategies in place. You'll have a higher net income...more equity in your practice...and a dramatically better quality of life. More important, you'll have a platform that consistently attracts affluent clients to your business. And you'll be able to make every year your best year ever.

Why wait? Call us at (888) 234-6991 and schedule your Best Year Ever Consultation today. I guarantee you'll be thrilled with the results.

Best in success,



**John J. Bowen Jr.**

Founder and CEO  
CEG Worldwide

**P.S.** What does your best year ever mean to you? For some advisors, their best year ever means a big boost in income. For others, it means having a bigger impact on their clients. And for many, it means enjoying a greater quality of life.

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But when you apply the strategies I teach in *Attract the Affluent*, you don't have to choose. You can enjoy more income...get better results for your clients...and enjoy a better quality of life, too. Call us today at **(888) 234-6991** to see if *Attract the Affluent* is right for you.



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