Beyond the Crisis – Opportunities to Grow Your Business!

Part 2

Dare to Dominate

With

Erin Botsford

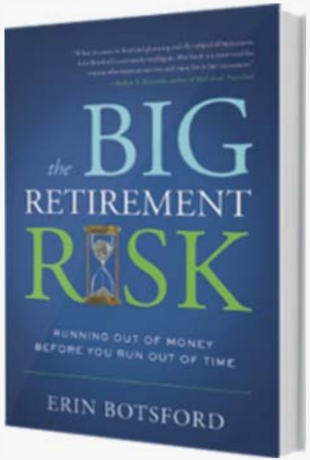
Presented By

fa-mag.com

Erin, Dominate…Right Now…??

I did it 3 times…so trust me when I say it can be done!

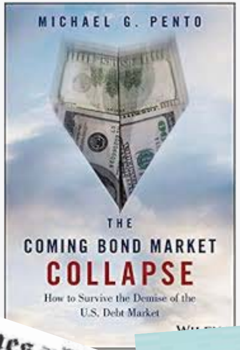
Who is Erin Botsford?



The Advisor Authority

ELITE SUCCESS SYSTEM WITH PROVEN RESULTS

I’ve Experienced Past Crisis’

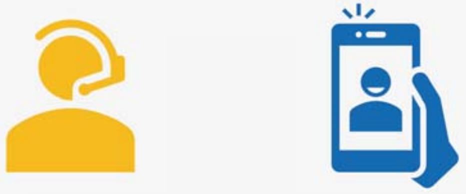


Key: Opportunities ALWAYS Accompany Chaos

One Advantage We All Have Now

- Clients and prospects are all at home… waiting for your call

Pick up the phone and call!



Review 5 Keys to Conquering the Crisis

1. **Realize Confidence is Key**
2. **"Put Your Own Mask on First" –** Fear & Worry Manager™
3. **Decide to Dominate –** COVID Exercise
4. **Step up and Lead**
5. **Focus on the Positives**

#1 – Make a Decision

- I decided to do 2 things
- Dominate Dallas
- How can you do it?

Key: you need a large commitment to maker this happen

How to Dominate

1. Find ways to get in front of more people
2. Need them to say “yes” to working with you/your firm

Getting in Front of Prospects

- One of **9** Prospecting Methods
- “Out to Lunch Bunch”
- “Compliment and Ask Questions”

***Ask:** who would you suggest I get to know?*

Out to Lunch Follow Up

- Immediately call each person
- Invite them to lunch
- Send hand-written note
- Add to newsletters & seminars

Give them the gift of talking about themselves

Domination Takes Activity

Mantra: breakfast, lunch, cocktails, dinner…repeat

They'll remember you as
the 'Interviewer'

Up Next: converting prospects into clients…

Mastering the Sales Process

- Don't lead with Investments or Insurance Products
- You need to differentiate yourself from the competition

Be Open: This may mean a huge shift in your thinking

Approach Talk

First prospect meeting =
My "Secret Sauce"

This process involves a lot of psychology!

LEAD with Risk Management!

Tell Your Story

- Key: Include painful life lessons
- I start like this…

"You may be wondering how I got into this business and why I'm uniquely qualified to help you with your financial planning"

Talk about Lessons Learned

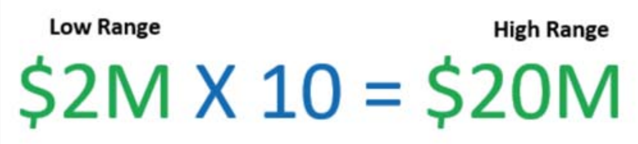
<u>My Lessons:</u>

- *Money Buys You Choices*
- *Choosing someone to trust with your money is a big decision*
- *Can you see why prospects are willing to listen to me?*

SO WHAT'S YOUR STORY?

I Begin the Discussion

- *"Today, I'd like to focus on what you've done in terms of risk management"*



Risk Management Topics

- **Disturbing Tracts = Potential Pitfalls**
- **Example Scenarios**

I have literally gotten the vast majority of my clients without ever discussing my investment process!

The Key to Getting Referrals

#1

- Articulating how you get paid
- Create an expectation for referrals
- Be clear, scripted and direct

I get paid in 3 ways! Introductions…

Dress for Your Audience

#2

- Mirror your target market

Dress for Success!

Greeting System #3

- Greet them within 2 minutes
- Welcome **“Mr. & Mrs. Smith”** on monitor

Seating System **#4 & 4a**

- Women Retain Absolute Veto Power
- Seating Psychology:
- Always seat the woman…
  at the head of the table

The Founder’s Video

#5

Founder’s Video Message:

1. Sets the stage
2. Establishes credibility
3. Shares your story effectively
4. Maintains your philosophy

Have Prospects Come to You

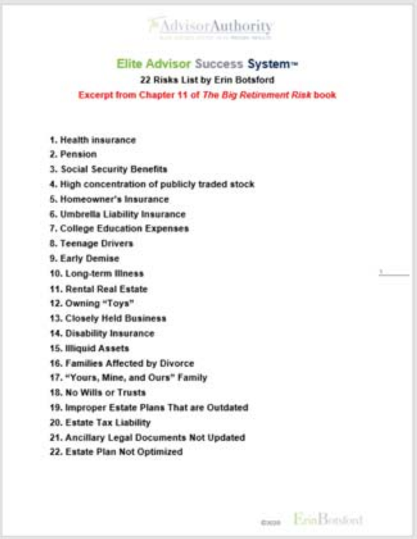
#6

- Biggest reason: Positioning Purpose

Be Relatable

#7

PEOPLE ARE MORE interested in working with someone who is relatable


AdvisorAuthority

Elite Advisor Success System™

22 Risks List by Erin Botsford

Excerpt from Chapter 11 of *The Big Retirement Risk* book

1. Health insurance
2. Pension
3. Social Security Benefits
4. High concentration of publicly traded stock
5. Homeowner's Insurance
6. Umbrella Liability Insurance
7. College Education Expenses
8. Teenage Drivers
9. Early Demise
10. Long-term Illness
11. Rental Real Estate
12. Owning "Toys"
13. Closely Held Business
14. Disability Insurance
15. Illiquid Assets
16. Families Affected by Divorce
17. "Yours, Mine, and Ours" Family
18. No Wills or Trusts
19. Improper Estate Plans That are Outdated
20. Estate Tax Liability
21. Ancillary Legal Documents Not Updated
22. Estate Plan Not Optimized

ErinBotsford

My Gift For You

- **"22 Risk List"** to help you now
- Plus Free **"Office Hours" - Thursday, May 21, 3:00cst**

Download Now

www.erinbotsford.com/famag

Next Presentation…

- ***“Dominate Your Marketplace – Part 3”***
- **Monday, June 1 at 3:00 pm CST**

I’ll share my tips on how to “Build Your Machine”…Pre-register now

Q & A Time?

www.erinbotsford.com/famag

This concludes...

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With

Erin Botsford

FINANCIAL ADVISOR

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