



**December 10, 2014**  
**Happy Holidays!!!**

## UPCOMING EVENTS

### INTRODUCTORY WEBINARS:

Want to learn more about the CPA Team Based Model? Join us on an upcoming webinar:

***Friday 12/12 at 8:30am PST:***

<https://attendee.gotowebinar.com/register/2492306250262275329>

***Thursday 12/18 at 8:30am PST:***

<https://attendee.gotowebinar.com/register/7577929059261128193>



\*Can't make either of the above live webinars? Contact us for a recorded version.

## ARTICLE OF THE MONTH

### **The Argument For Relationships**

**"Coming together is a beginning; staying together is progress;  
working together is success."**

**- Henry Ford**

One of our financial advisors starts every email with that quote by Henry Ford. I initially scanned over it without much thought, but the more emails we exchanged, the more I considered its meaning. After reading it a few times, it hit me that Ford is really describing the process of developing a meaningful and mutually beneficial relationship.

When I was in college I was lucky enough to meet an extremely successful business owner named Alan. What made Alan truly unique was not his expensive cars, his golf club memberships, or his valuable companies. Instead, it was his ability and desire to build genuine relationships. Unexpected packages would arrive at my door containing a

few books and a handwritten note reading, "I thought you'd enjoy these." I'd receive a random voicemail saying, "No rush on calling me back, just wanted to check in with you and see how things were going." Or my favorite, he'd call and say, "I just met someone I think you should get to know. Can you join us for lunch next week?"

In our modern world of LinkedIn, Facebook, Salesforce, Constant Contact, GoToWebinar, and all of the other amazing programs that have sent our productivity through the roof - is there still a role for the "old fashion" approach of building genuine relationships with one person at a time?

I believe the answer is yes. And having coached dozens of financial advisors and CPAs, I know I am not alone. However, it is a real challenge to find the time to build more genuine and sustainable relationships when we are already busy and feel stretched in a hundred different directions.

I'd like to share a few suggestions with you on this topic with the hopes that you find them helpful.

**1) Use Leverage** - If you want to create more time to build genuine relationships, you will need to figure out a way to use leverage to create more bang for your buck. For example, in our company's model, we train our financial advisors how to leverage the relationship and trust that already exists between a CPA and their client, and we teach CPAs to leverage the financial advisor's expertise and their accompanying team of specialists to provide the services that their clients need, but they themselves do not offer. In this way, both parties are leveraging each other.

**2) Focus on Quality Over Quantity** - If you had two different types of advisors, one that only needed five clients and the other that needed fifty clients, which advisor do you think would have a better relationship with their clients? Arguably the advisor with only five clients because they would have more time to focus on developing a relationship with each of those five individuals. However, in the world of finance where more is almost always perceived to be better, why would you only want five clients? Well, what if each of those five clients were CPAs that represented five hundred of their own clients? Focus on a quality relationship with a handful of individuals and then leverage those relationships to exceed what you could do on your own.

**3) Don't Reinvent the Wheel** - Far too many professionals seem determined to reinvent the wheel on their own. If you want to excel at something, find someone (or a group) that has done it before (and done it well), then copy what they have done! You can save yourself thousands of hours and hundreds of thousands of dollars by learning from other people's successes and failures.

The success or failure of your business relationships will have very little to do with the products you offer and much more to do with the value you deliver. Find ways to bring genuine value to people, invest the time to get to know them, and help them achieve their goals, and you will create true win/win relationships that allow you to far exceed your own individual capabilities.

Anton J. Anderson

*Anton Anderson has a diverse financial background as an investor, advisor, trainer and published author. He specializes in working with CPAs, and has produced numerous articles and training programs on the topic.*



in the country on a variety of planning topics. 16 CPE credits offered

**July 9 & 10, 2015**

**CPA Team Based Model Institute**

2-Day training event in San Diego for financial advisors interested in working with the CPA Team Based Model.

**October 15 & 16, 2015**

**CPA Team Based Model Institute**

2-Day training event in San Diego for financial advisors interested in working with the CPA Team Based Model.

**November 9 & 10, 2015**

**Elite Tax Planning Academy**

Educational event designed to teach CPAs and financial advisors how to use the CPA Team Based Model to increase holistic and proactive planning, as well as learn from some of the top specialists in the country on a variety of planning topics. 16 CPE credits offered

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