



January 2016

## UPCOMING EVENTS

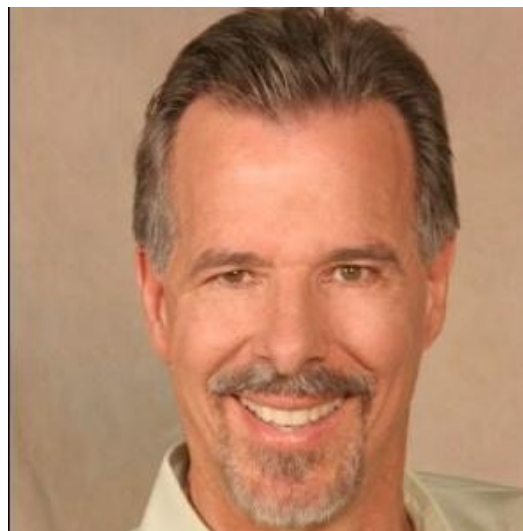
### EDUCATIONAL WEBINAR:

**Topic:** ESOPs (Employee Stock Ownership Plans)

**Date:** January 20, 2016

**Time:** 8:30-9:30am PST

**Speaker:** Martin Staubus, Executive Director of Beyster Institute



Do you know what an ESOP can do for business owner clients? If not, now is the time to find out because if you're not bringing them up with your clients, someone else will be.

Martin Staubus is the executive director of the Beyster Institute, part of the Rady School of Management at UC San Diego, where he advises business leaders on the design and operation of employee stock ownership programs to build stronger companies and provide liquidity to owners. Martin has 30 years of experience in business, having served in varied roles as an attorney, consultant, Labor Department policy advisor, corporate executive and corporate director. He has served as Associate Director of the ESOP Association in Washington DC, and as a director of the National Center for Employee Ownership.

Nationally recognized as an expert on the design and operation of employee stock plans, Martin has written extensively in this field, with work published by Harvard Business School Press, Harvard Business Review, and others. He is a frequent speaker on this subject and an adjunct professor at the UC San Diego Rady School of Management. Martin holds a BA in economics from UC Berkeley, an MBA from the George Washington University in Washington DC, and a law degree from Golden Gate University in San Francisco.

**Registration Link:**

<https://attendee.gotowebinar.com/register/4969995239490492674>

## ARTICLE OF THE MONTH

### It's a New Year - Let's Get Back to Basics

Vince Lombardi, the legendary coach of the Green Bay Packers, approached his players the day after an embarrassing loss. He stood in front of his team, took a deep breath, and then said, "Okay, we go back to the basics this morning..." Holding a football high enough for all of his players to see, he continued, "Gentlemen, this is a football."

Talk about going back to the basics - he's talking to professional football players on a championship team! Vince Lombardi's philosophy was simple - excellence can be achieved by perfecting the basics.

Some may argue that the world of professional services (regardless of whether you're a financial advisor, insurance agent, CPA, attorney, etc.) has very little in common with professional football. However, I believe that Vince Lombardi's philosophy is just as applicable to the professional services industry as it is to football.

A flashy website, nice suits, or exaggerated stories will impress people (for a while) and even get you some initial clients. However, it is just a matter of time until people start to see the weak spots in your game and your shaky foundation comes back to haunt you.

In order to be a championship team, much like a top-notch professional, you need to dedicate the time to learn how to do it right from the beginning and then maintain that commitment to excellence through continued learning throughout your career.

There isn't a better time to apply the lessons learned from Vince Lombardi than at the start of a new year. Now is the time to take a deep breath, and get back to the basics.

Here are a few suggestions on how to do just that:

**1. Study Others' Successes:** Regardless of where you are in your career - the company intern or the company owner - you have plenty to learn. Learn

from others who have accomplished something that you are striving towards. For example, in our company we provide our financial advisors training manuals on how to develop more valuable and profitable relationships with CPAs. By studying this material, they shave years off their learning curve. What material exists that could shave years off of your learning curve?

**2. Learn the Fundamentals:** Tom Brady is one of the best quarterbacks of all time. During a recent press conference after an incredible come-back victory over the Baltimore Ravens, a reporter asked him about an unusual play that the Ravens' coach argued was illegal. Tom Brady's response - "Maybe those guys gotta study the rulebook and figure it out. We obviously knew what we were doing." Do you know your industry's rulebook as well as Tom Brady knows his? When other "professionals" in your industry are confused on the details, do you understand the fundamentals well enough to fly past your competition?

**3. Ask The Hard Questions:** Patricia Fripp, the well known speaker and author, said, "Most people spend more time planning next summer's vacation than they do planning the rest of their lives." You have as much control over your career direction as you do over the next vacation you take. In order to evaluate the path you're on, as well as the direction you want to go, try answering the follow questions:

What originally attracted me to my profession?  
Where did I start, and where am I today?  
Where do I want to be at the end of 2015?  
What difficulties do I face in getting there?  
Who can help?

If these three suggestions seem basic to you, then this article hit the nail on the head. However, don't mistake basic with ordinary. In our company, we have had the opportunity to work with hundreds of financial advisors, insurance agents, CPAs, and attorneys. Although many of them are kind people with good intentions, topnotch professionals are so rare across our industry that it makes you want to stand up and say,

"Ladies and gentlemen, this is a client."

- Anton Anderson and Ken Smith, Co-Founders of Elite Resource Team



## THE CPA TEAM BASED MODEL

The CPA Team Based Model is a proprietary system designed to help CPAs offer more proactive and holistic services to meet the continually-evolving needs and expectations of their clients. This is accomplished with the support and guidance of a specially-trained financial advisor, along with their top-notch team of specialists provided by ERT. When this partnership is developed with the mutual goal of delivering more meaningful value to the CPA's client, and the advisor becomes the go-to resource for all of the CPA's needs, a true win/win/win is created. Learn more at: [www.elitert.com](http://www.elitert.com)

## OTHER EVENTS

**January 21 & 22, 2016**

**CPA Team Based Model Institute**

2-Day training event in San Diego for financial advisors interested in working with the CPA Team Based Model. Interested in learning more? [Click here](#)



**April 21 & 22, 2016**

**CPA Team Based Model Institute**

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

**June 16 & 17, 2016**

**Elite Tax Planning Academy**

Co-hosted with Certified Tax Coach, this educational event is designed to teach CPAs and financial advisors how 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 free CPE credits offered.

[Click here](#) to register

**July, 2016**

**CPA Team Based Model Institute**

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

Based Model.

**STAY CONNECTED**



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