



July 2016

UPCOMING EVENTS

Educational Webinar

Are you ready to run a joint client meeting with a CPA? Or if you already have run joint meetings, was there anything you could have done better?

Joint client meetings are very exciting, but they're also delicate. There are a lot of nuances to be aware of and plan for. During next week's CPA Team Based Model Educational Webinar (for advisors and CPAs) we'll be discussing how to effectively run joint client meetings.

Here are the details:

7/20 - TBM Educational Webinar Series, for Advisors and Tax Professionals

Time: Wednesday, 8:30am PST - 9:30am PST

Speakers: Anton Anderson and Ken Smith

Topic: How to run successful joint client meetings using the CPA Team Based Model

Registration Link:

<https://attendee.gotowebinar.com/register/2491926931796593154>

ARTICLE OF THE MONTH

CPA Team Based Model Training Goes Virtual

We're excited to announce that after dozens of requests from advisors, **we've just released our online training program!**

Moving forward, this will replace our in-person two-day training event, previously held in San Diego, CA. Although it is hard to match the value of face-to-face training, going virtual allows us to work with a larger variety of advisors from across the country.

The new online program consists of an **8 week course, which includes:**

- **Weekly training videos**
- **Complete training manual, scripts, and email templates**
- **Live group Q&A calls**
- **One-on-one coaching calls**

- **Private membership to online group**
- **And much more...**

We've already begun enrolling new advisors and so far the feedback has been very positive.

Here's what one advisor had to say:

"I believe Elite Resource Team has assembled one of the most knowledgeable groups of advisors I have ever seen in my 46 years in our business. We truly have the opportunity and privilege to help CPA firms get to a much higher level of service by implementing tax reducing strategies known only to specialists. **As it should be, the real winner in this process is the client.**"

- Dick Griffis

If you'd like to learn more about our online training, click here: <http://try.elitert.com/case-study-landing/>, or contact us to set up a call at info@elitert.com.

As always, let us know if there's anything we can do to help.

Continued success,

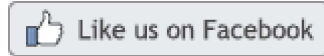
Anton Anderson and Ken Smith



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

STAY CONNECTED



402 West Broadway, Suite 400
San Diego, CA 92101
T: 888.626.9672 F: 949.209.1804
Email: info@elitert.com
Website: www.elitert.com

SAND, 402 West Broadway, Suite 400, San Diego, CA 92101

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