



November 2015

UPCOMING EVENTS

EDUCATIONAL WEBINAR:

Topic: Alternative Qualified Solution

Date: November 18, 2015

Time: 8:30-9:30am PST

Speaker: Mary Read, CPA, QPA



Qualified Plans enable business owners to benefit from substantial tax deductions and accumulate wealth on a pre-tax basis, BUT what happens when your clients have built up the money inside of a qualified plan and then later in life don't need it? When taxes are reduced on distributions you have a winning combination of tax-deductible contributions, tax-deferred growth and tax-advantaged distribution. In this webinar, learn about a unique distribution strategy that can reduce taxes at distribution 35 - 40%.

- Current substantial tax-deductions
- Life insurance purchased with pre-tax dollars
- Eliminate 35-40% of the tax on qualified accumulations, such as IRAs, 401(k) accounts and defined benefit plan lump sums.

Mary Read CPC, QPA is National Director of Pension and Protection Planning at Alliance Benefit Group-Pentegra and partner of M & R Business Development Group. A leading authority in qualified retirement plans with more than 30 years experience, Mary has an extensive background in plan design and development.

Registration Link:

<https://attendeegotowebinar.com/register/2756198943584131842>

ARTICLE OF THE MONTH

Three Things Advisors Should NEVER Say to a CPA

Last month we had the opportunity to spend three days with 30+ CPAs at a training on advanced tax and business building techniques. One of the featured topics was - "The Power of Partnering with Financial Advisors." The speaker opened with this question, "What's the worst pick-up line you've heard from a Financial Advisor?" The room immediately erupted with story after story about bad opening lines and insulting conversations. Although there were nearly a dozen to choose from, we'd like to share with you the top three opening lines the CPAs agreed a financial advisor should never use with a CPA.

1. I have clients I want to refer to you!

This might sound like a great line to a financial advisor, but the CPA is thinking, "Really? You don't even know me, why would you refer me a client?" Most CPAs will assume you are either: a) lying or b) careless (if you're willing to introduce your client to a CPA you don't even know, how can they trust you with their clients?).

2. Have you heard about this new product?

One of the key differences between financial advisors and CPAs is the professions' "cultures." Financial advisors come from a sales culture, whereas CPAs come from a service culture. Opening a conversation with a "hot new product" is proving you come from a sales culture and in most circumstances will result in skepticism from the CPA.

3. I can make you more money!

Making more money may be the driving motivation for the majority of financial advisors but it's not for the majority of CPAs. As one CPA said during the conference, "My bank account looks fine; it's the work/life balance with which I struggle. I have a 6 year old that I haven't seen in three weeks because I leave before he's up in the morning and get home when he's already asleep."

If any or all of the opening lines mentioned above sound like a pick-up line you may have used on a CPA in the past, stay tuned for next month's newsletter for what you should say or focus on in the future.

Until then, we wish you continued success,

- 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

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



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

[Forward this email](#)



This email was sent to info@elitert.com by info@elitert.com | [Update Profile/Email Address](#) | Rapid removal with [SafeUnsubscribe™](#) | [About our service provider.](#)



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