



November 2016

ARTICLE OF THE MONTH

What's Stopping You from Working with CPAs?

After speaking with nearly 1,000 financial advisors and insurance agents over the past 5 years, I've boiled it down to 3 main reasons why most firms are struggling with these types of relationships.

1. No Unique Value Proposition

CPAs are inundated with requests from everyone under the sun to "share referrals." You need a truly unique value proposition that can genuinely help CPAs and their clients!

Here is a recent example of an advisor we're working with named Andy Bowman figuring out how powerful it is to have a Unique Value Proposition:







Andy Bowman



September 29 · Bradenton, FL

Thanks to my affiliation with Ken and Anton, I will have a distinct advantage over the FA "crowd of the same old same old". The article below is poignant on the future of the FA world.

Robos and Human FAs Will Wage War Over Mass Affluent
financialadvisoriq.com

 You, John Daley and 3 others
  2 Comments
  Seen by 29

 Like

 Comment

 Share

Here's another advisor named John Daley experiencing firsthand how quickly things can happen if you truly focus on helping the CPAs rather than just getting referrals from them!

