ELITE RESOURCE TEAM

October 2015

UPCOMING EVENTS

EDUCATIONAL WEBINAR:

Topic: Long Term Care for Business Owners
Date: October 21, 2015
Speaker: David Wolf

Business owners have many options available to them when it comes to Long Term Care, including paying with pre-tax dollars. Mr. Wolf is the president and owner of Wolf & Associates, and has specialized solely in Long-Term Care Planning since 1988. David's expertise in Long-Term Care Insurance planning with business owners and executives has gained him national recognition in his field. He has been quoted numerous times by the Wall Street Journal, Barron's, and others. His depth of knowledge in creative tax applications for these products has made him a recognized leader and speaker.

Registration Link:
https://attendee.gotowebinar.com/register/5497181376071497218

ARTICLE OF THE MONTH

It's All About the Relationship

Last week we were honored to have nearly 30 high-end financial advisors with us for our quarterly CPA Team Based Model Institute. Towards the end of the event one advisor said "I like how your model is all about the relationship."

Although that may sound good in theory, you may be wondering - 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.
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> **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.
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> **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 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 advisors, 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

November 11 & 12, 2015
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

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, 2016
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

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.

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