



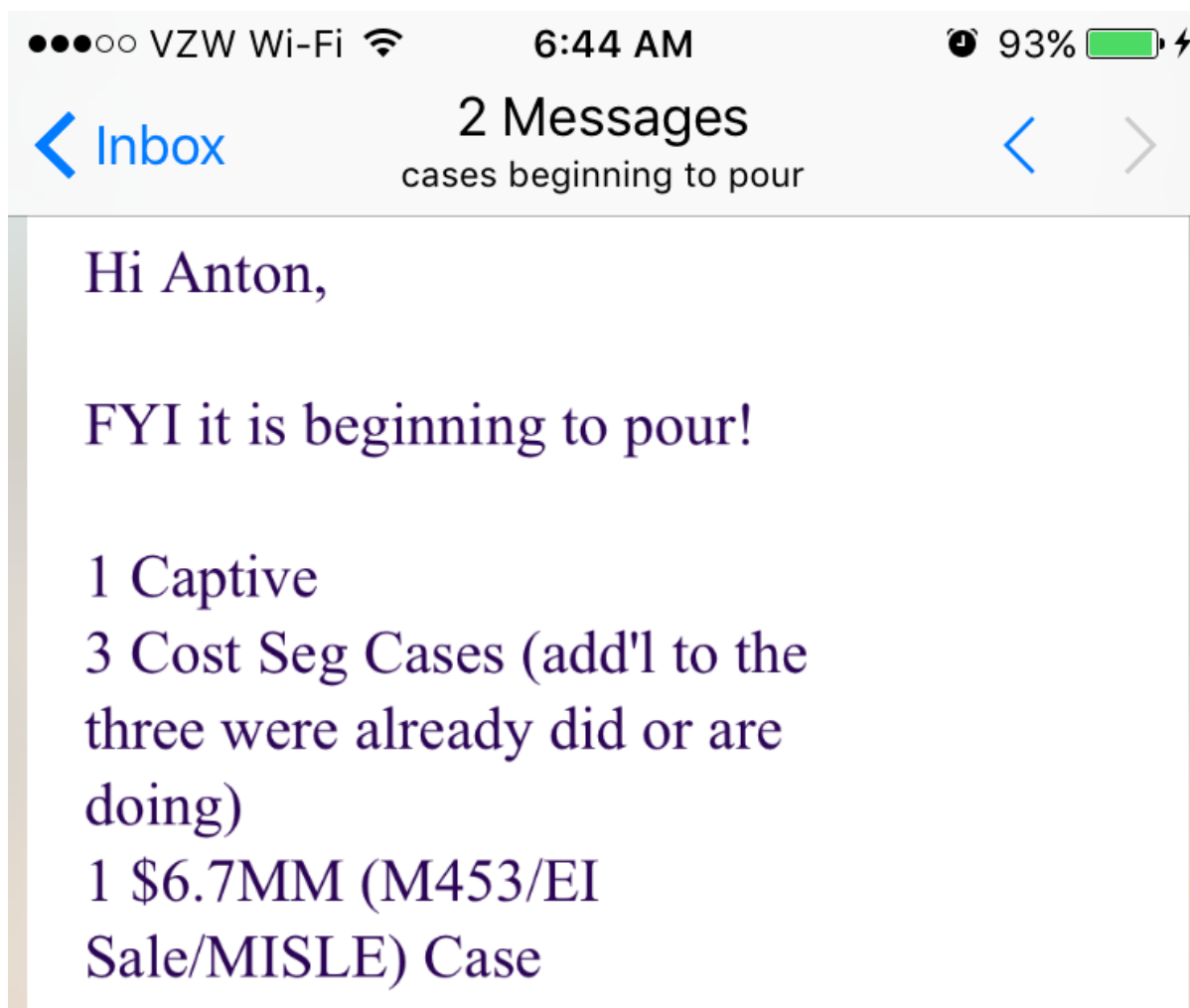
October 2016

ARTICLE OF THE MONTH

How many new cases did you get from CPAs last month?

Let me guess...0? Maybe 1 or 2? Maybe?!

Well, take a look at the below email from Stephen Burgess, one of our advisors using the CPA Team Based Model...



2 Premium Financed life cases
4 Max Funded Solo 401/k or
SEP plans
2 Regular (but Large) Life Cases
1 Buy Sell agreement funding
(potentially Premium Financed
Life)
2 Estate plans

all from 5 clients all with the go
ahead.

SB



See the difference between Stephen's situation and most advisors TRYING desperately to get one or two referrals from a CPA?

Here is the problem that you are facing...CPAs are constantly bombarded with referral requests from financial advisors, insurance agents, mortgage brokers, attorneys, P&A agents, and on and on...

...So what is your unique value proposition?

HINT: It better not be that you'll help them make more money because that's what everyone tells them!

**HOW ARE YOU GOING TO DEVELOP MEANINGFUL, PROFITABLE,
AND LASTING RELATIONSHIPS WITH CPAs?**

Don't have an answer to that question?

Well this is exactly what we do.

