



September 2015

UPCOMING EVENT

EDUCATIONAL EVENT:

CPA Team Based Model Institute
October 15 and 16, 2015

The CPA Team Based Model Institute is designed to train financial advisors how to **identify, contact, establish, monetize, and maintain relationships with CPAs**. This is



not a lead generation program, but rather a highly specialized model designed to help top-notch financial professionals reduce traditional inefficiencies and significantly increase profitability.

"Bottom line, if you fail at working with CPAs after going through this training, it is only because you did not implement what was taught."
James Robinson

"You definitely need to attend the institute - do whatever it takes! Elite Resource Team has thought through every aspect an advisor needs to be successful working with CPAs. This is different than anything I've ever seen." Sterling Daley

"I have always been a good networker, but this gives me a genuine way to approach CPAs with a step-by-step system that creates a true win/win."
Mark Gardner

Now is the perfect time of the year to build strong relationships with CPAs. If you're serious about your career and want to work with a proven model, click on the below link to learn more.

To Learn More and Register, [CLICK HERE](#)

SHORT INTRO VIDEO SERIES

Want to learn more about Elite Resource Team? [Click here to watch 3 min video.](#)



THE CPA TEAM BASED MODEL

Check out what our advisors have to say: [Testimonials](#)

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 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

October 15 & 16, 2015

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](#)

November 10 & 11, 2015

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. Interested in learning more? [Click here](#)

STAY CONNECTED



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