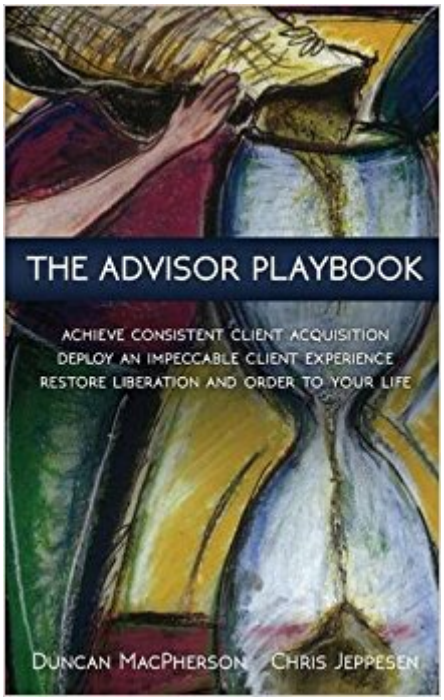
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The Advisor Playbook: Regain Liberation And Order In Your Personal And Professional Life



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Synopsis

Practice management is often misunderstood. The Advisor Playbook will take the mystery away. Practice management isÃ Â confused with marketing, or is limited to strategizing about branding, or simply equated to old-school salesmanship. Practice management is how you build an organized toolbox of all your processes Ã¢â ¬â œ branding, marketing, service activities, core functions Ã¢â ¬â œ and constantly tune and keep that toolbox efficient and effortless. ItÃ¢â ¬â„¢s a network of interrelated skills, processes and strategies that build value in a business while making it manageable, scalable and ensuring the owner runs the business and not the other way around. Duncan MacPherson and Pareto Systems have been in the forefront of practice management in the realm of the professional advisor for a quarter-century. Chris Jeppesen of First Trust brings his own decades of professional knowledge to the table. The processes in The Advisor Playbook have grown over those years, through constant refinement and improvement. TheyÃ¢â ¬â„¢ll help you to perform that same refinement and improvement on your business, and regain liberation and order in your personal and professional life. As you progress through the book, youÃ¢â ¬â„¢ll realize that each process is implemented in synergy with every other. Referrals are influenced by your service which is influenced by your process, which is influenced by your philosophy, which is influenced by your ideal client definition, life and business goals. Nothing exists in a vacuum, and everything is, in the end, focused on a single unwavering goal: To build real, advocate relationships with your ideal clients that will generate both growth through referrals and the capacity for that growth. How you are perceived is key in every step of that circle, and readers who take on board what the Playbook outlines will come away with an understanding of how they are perceived, how to cast themselves as a consultant with a process rather than a salesperson with a quota, and will set a constantly rising bar for their own success. YouÃ¢â ¬â„¢ll be amazed at how common-sense most of the processes and strategies seem, and probably horrified at how often youÃ¢â ¬â„¢ve wandered from the path or failed to implement them due to a lack of clarity or simple distraction. The Playbook will guide you to an actionable plan and process that makes going to work a positive experience, and a positive investment.

Book Information

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Customer Reviews

I am the CEO of Pareto Systems, a practice management and business development consulting firm dedicated to improving the productivity of professional advisors. I've spent the last 20 years traveling the world speaking at conferences and coaching top performers on how to deploy a process that will unlock their full potential personally and professionally. Along with my team of coaches, I have developed and refined several one-to-one consulting programs including The Pareto System, The Fee-worthy Advisor, Succession 360 and the Advisor Flight Plan. I've also collaborated with enterprise clients to create one-to-many solutions, including train-the-trainer approaches. I've invested those experiences into a philosophy that says stewardship is more attractive than salesmanship, and a process that makes implementation predictable and sustainable. My goal is that you can translate that into results using this Playbook. I live in Kelowna, British Columbia, Canada and I can be reached at dmacpherson@paretosystems. You can also find me on LinkedIn at ca.linkedin.com/in/duncanmacpherson.I am the Head of Advisory Practices at First Trust, a firm known not only for its robust investment product line which includes UITs, ETFs, SMAs and VAs (to name a few), but also for its commitment to the growth of financial advisors. First Trust has dedicated many years to finding (and investing in) creative ways to help financial advisors grow their practices. As the Head of Advisory Practices, my goal over the last 18 years has been to give financial advisors the tools to develop an efficient business model focused on building long-term client trust and loyalty. First Trust has helped develop this model through a broad range of investment, advisory and management solutions and I am proud that First Trust has been nationally recognized for this solution-based approach. The Advisor Playbook is the culmination of my years of practice management and seeing financial advisors achieve success through these proven methods and strategies.

I spent a day in a MacPhearson workshop. Great event. This book adds to clarity the workshop but

should also improve customer service without the workshop.

Strong content.

If this book doesn’t help you get ahead financially - You are not ready the learn.

Ridiculously phenomenal work. You are a master communicator Mr. Mac Pherson

Fantastic book for any financial professional.

Fantastic, insightful and real

Great book.

If you might want to change how you are doing things as a financial advisor this book is for you. Many things in this book resonate with me but it may not for all advisors. Being in the business for only a few years, I will be using this program to "up my game" so to speak. It’s all about establishing and keeping a relationship with your clients as you guide them on their path to financial freedom.

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