

Make the complicated simple. GROW YOUR PRACTICE.

Acclaimed speaker Jonathan Lee, CEO of the Foundation for Financial Education, has visited more than 40 sales offices around the country. He knows what works and what doesn't. And he's ready to show you what he's learned. Most producers are good people, and have good personalities. They have industry experience and rapport with their clients. Unfortunately, that's not what takes you to the next level. You have to understand your **process** and **practice** on a different level.

Focus. What *matters*?

For **marketing**, you need to think about how to get in front of people without bribing them — without dinners, without mail drops. Get them to come to you. Once you've done that, streamline your **sales process and system**. If you take yourself out of the business, does it continue to grow, or does it fall apart without you? Are you mining your CRM for retirement dates and other milestones?

Once you start implementing what you learn at the **Elite Advisor Academy**, you're going to be more like a surgeon. You do the surgery, and then you're on to the next patient. You don't have to sell yourself. Having a support system including a **customer relationship management (CRM) system** will enable you to write in volume. Maybe as much as 500 to 700 cases a year.

There are three things the Elite Advisor Academy will focus on while you are here for the one-and-a-half-day course.

1 MARKETING

- Conduct library and college educational workshops.
- Attain FINRA recognized designations.
- Federal Employee Program.

2 SALES PROCESS AND SYSTEM

- Four-Step Sales Process Training.
- Joint-work and mentorship.
- Find a condensed, user friendly software system.
- Easy to use point-of-sale calculator.
- Staffing and recruiting outline.

3 CLIENT RELATIONSHIP MANAGEMENT (CRM) SYSTEM

- Solidify long-term strategy with your clients.
- Enter future flags into your CRM for business opportunities.
- Double your income and learn to generate revenue off existing clients for years to come.
- Five-year retention of clients.

Don't waste time.
GROW YOUR BUSINESS.

To attend our Elite Advisor Academy featuring **Jonathan Lee**, contact CreativeOne today at

800.992.2642.