

The million-dollar financial services practice: a proven system for becoming a top producer

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Abstrak

Other books have claimed to help readers build a lucrative financial services practice...but it was "The Million-Dollar Financial Services Practice" that provided ambitious financial advisors with a step-by-step, tactical process proven to work. The second edition is updated throughout and contains new strategies for acquiring affluent clients and assets by providing Wealth Management services, using social media and "Alumni Marketing," targeting successful realtors as clients, and much more. Using the method he has taught at Merrill Lynch and is famous for in the industry, author David J. Mullen, Jr. shows how anyone - no matter where they are in their career - can get the appointment, convert prospects to clients, build relationships, retain clients, use niche marketing successfully, and increase the products and services each client uses. Packed with templates, scripts, letters, and tried-and-true Market Action Plans, the book provides readers with the tools and guidance they need to take their financial services practice to the million-dollar level and beyond.