Exclusive Training Program

Elite Training for Advisors Ready for Exponential Results.

The Advisor Authority

www.ErinBotsford.com

For more information contact:
info@erinbotsford.com | 866.846.4943

EliteAdvisor Success System

CNBC CNN WALL STREET JOURNAL BARRON'S TOP 100 FOX BUSINESS InvestmentNews WOMEN to WATCH MSNBC

"I grew my business from $300k to $3 Million in record time, and it changed everything.

Let me show you how your advisors can achieve the same results with the exact blueprint I used. They can avoid mistakes and grow their business exponentially. What advisor doesn't want that?"

– Erin

The Hard Truth

Most advisory practices are created by a single advisor who becomes the name and face of their firm. They may have employees who get work done, but only because they, –the advisor– is there every day to make things work.

They make the important decisions and they generate all or most of the business. They meet with all of the clients and perform most of the important tasks in their organizations.

In the beginning, things grow steadily and they start making a name for themselves. Then, as if overnight, they are overwhelmed with how much needs to be done, and they begin to realize they are too busy working IN the business to ever work ON the business.

The painful reality is that most financial advisors end up getting caught in the "Self" Employment Trap. They're working so hard, they fail to notice they've given themselves a never ending "job" at their own company. They can't step back and focus on growing the business itself because they're too exhausted running the day-to-day.

What's more, because of the way they are building their business, the more success they have, the more trapped they become inside their company.

I've been there. I'm here to tell you it doesn't have to be this way. I found a way out of that rat race and went on to build a multi-Seven Figure Firm, I want to share with your advisors **exactly** how I did it.

Your Advisors Will Get the Exact Blueprint.

65%

Advisors are feeling the pressure of balancing work and life these days. A recent survey found 65% of advisors feel they can't find a balance because more clients means more work. Only 18% said they were happy with their profitability and 15% with its growth trajectory.*

There's a better way.

Financial advisors are more stressed out than their clients, study finds, CNBC 5/22/2019 https://cnb.cx/2KRX8EB

EliteAdvisor Success System

What if I told you it's possible to teach your advisors everything they need to know in 5 months? When I say *everything* I mean everything I've tried, tested, and made sure works so your advisors don't waste any time with tools and philosophies that don't help them grow. I want to help advisors grow their financial planning businesses in the fastest time possible because they deserve the freedom that comes along with a business that lets them serve more clients, make more money, and experience more freedom.

That's why I created my interactive online course. I condensed decades into days, and 30 years of experience into 5 months of learning. The system is broken into five modules with one subject area per month plus a live Q&A with me to keep advisors on track.

Throughout the program, each participant is given a "repeatable roadmap" to take back to their business and use immediately. This is the exact blueprint I used to build my business in a way I never thought possible. It's not about working harder – it's about using the right tools to work smarter.

My goal is to get this life-changing and business-growing information into as many advisor's hands as possible while ensuring the integrity and efficiency of the course.

When your advisors sign up for my e-course, they (and you) are getting resources and proven methods that cover ALL aspects of the business; especially the importance of reframing the perspective from advisor to business owner.

Let's explore some of what advisors will learn in each module.

Elite Advisor Mindset

How mastering your mindset will catapult you to the next level.

- How the "C.A.N.I. Concept" is used to evolve your mindset and your business.
- A critical 'Current State of Your Business' Quiz you must take ASAP.
- How to know if your actions are congruent and aligned with your goals.
- Use this one "End of Life" exercise to put everything in your life into proper perspective.
- The one advisor tracking activity that changed my business completely.

Elite Advisor SecretSauce

Exactly what you need to do to get more prospects to say YES!

- Determining your best target market and finding out their needs.
- Don't lead your talk with these 2 things…EVER.
- What is the best seating arrangement that will boost your closing rates?
- What is the best way to use the prospects net worth in your sales talk?
- My actual sales scripts that sold hundreds of millions in $$ over 30 years!

Elite Advisor Prospecting&Marketing

9 Ways to Bring in More Clients in Less Time with Less Money

- What 2 main psychological factors drive all decisions for your clients.
- Why the 'No Family, Friends & Neighbors Policy' worked so well for me.
- What early AM tasks brought in the most small-business clients.
- What was the FASTEST way I built my firm that you can still do today.
- My pre- and post-scripts, sample flyers, and resources.

Elite Advisor TeamMemberTraining

The Exact Blueprint to Achieve Rockstar Status

- Learn the specific tasks and duties of an "Admin" to help make the practice efficient.
- You can have 10 of my best email templates to use in your email correspondence.
- What the '10 Steps of our Process' are and how these can help you too.
- How to train a team member to be the "perfect assistant."
- How to best take care of your 'old-school' clients

The AdvisorMachine

Create Your Dream Team to Run Your Systems & Processes for Flawless Execution

- Who to hire first, second, and next on your dream team.
- The best compensation models to implement.
- The job descriptions we used which brought us high-quality candidates.
- How we built our systems & processes manual by asking this 1 question.
- How to confidently and successfully **transfer your clients to your team.**

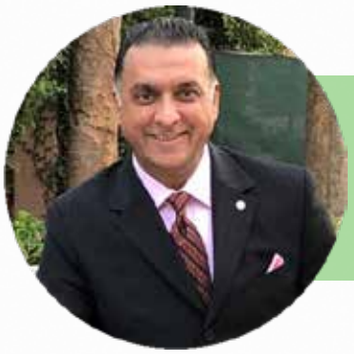
This is a true FREEDOM BUILDER.
It creates the biggest impact, guaranteed.

"The Elite Advisor Success System is a great course. If you are looking to grow your practice to a business, this is the course for you. **I am up over 60% in revenue** for Q1 of this year, compared to last year. The ideas and strategies Erin provides through in the course have been a major part of helping grow my business.

– Jason J.

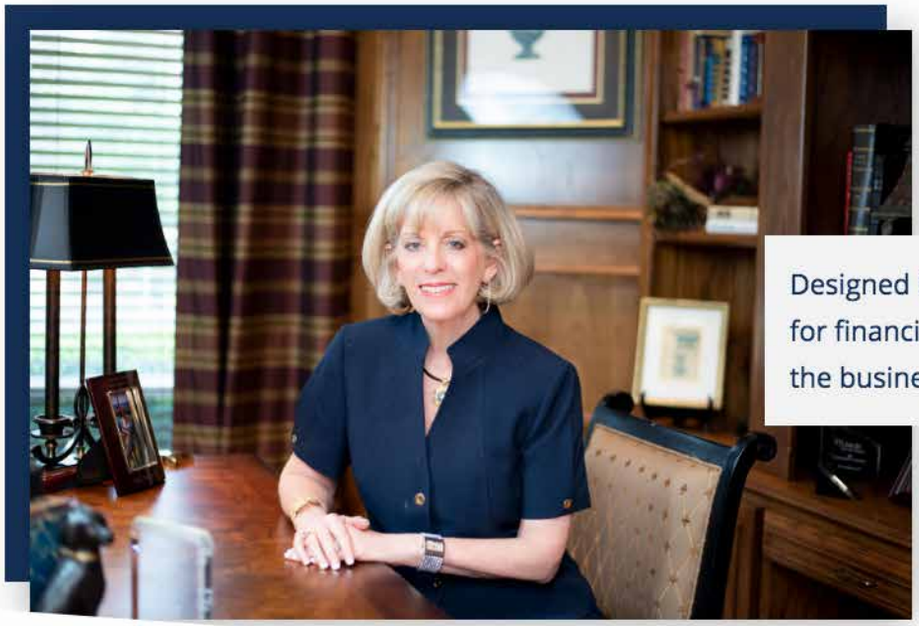
"I must tell you that in my 13 years as an advisor and 22 years in the corporate world, I have never attended a better or more effective class. Erin is absolutely amazing and shared so many sales ideas, organization, administrative and many more items with us. It is not often that I say **it is worth every single dollar**, but it is!"

– Kerina G.



"The material that you have put together is one of a kind, and I believe no one in the financial services industry has put together content as comprehensive as you have. **I have benefited hugely** because as a relatively new practice, many of the components that are necessary to build a successful financial services business were not in place."

– Karim H.



EliteAdvisor Success System

Designed by a Barron's Top 100 Advisor for financial advisors who want to build the business of their dreams

as ***fast*** as possible...

Here's What Advisors Get

- ✓ Online membership access to the full video-based 5 full courses listed above – so your advisors can watch and learn whenever and wherever. (over 14 hours of unique recordings)
- ✓ Online membership access to all the mp3 audio tracks for all the courses – so advisors can listen while driving, commuting on the train or anytime. (hours of recordings)
- ✓ Online membership access to all the resources: worksheets, cheat sheets, templates, checklists, scripts, quizzes and exercises – so your advisors can apply materials now. (dozens of ready-to-use resources)
- ✓ Online membership access to all the written transcripts and all the Power Point slides – so they can print these out and read them at night or whenever they schedule time to study.
- ✓ Private Online "Member's-Only" group access – so they can chat with others in our elite community, get feedback from fellow advisors, meet accountability partners to share ideas, and stay on track.
- ✓ **AND** Exclusive access to monthly live Q&A teleconference access – so they can get ALL their questions answered on a LIVE call-in with Erin – (we'll record these so if you can't make it live – no worries) Erin normally charges $10,000 for an hour presentation!
- ✓ **PLUS Bonus Access** – they will continue to have access to the online platform and the monthly calls for an additional 7 months for a total of 12 months!

Why This Program Works

After training hundreds of advisors at all levels of production, I am keenly aware that advisors, given the choice, would prefer to learn from someone else who has actually done it. They want someone who has been in the trenches and has faced the challenges they face on a day to day basis and has come out on top.

So many training programs and conference speakers are consultants who are essentially "consolidators of practice management ideas" but who have never actually built a multi-million dollar advisory business. Because of my credibility in the industry as a top producer, advisors will take my advice – **they know it's not theory**.

As a result, they get the outcomes they are looking for because they're not having to figure it all out on their own. They simply model success.

It's not coaching. It's modeling. And it works.

What Makes It Different

This is **NOT** a coaching program. Instead, I invite advisors to **model** what I did to create a multi-million dollar practice. Coaching is great for accountability, but modeling is the quickest way to achieve actual results.

In addition, coaches want to keep advisors on the hook for decades. Instead, I want them to get involved right away, do the work, and just copy the exact steps I took and tools I used.

My program is designed so advisors can go through it in five (5) months – not 5 years. After completing the program, the advisors are invited to participate in monthly follow-up calls to address additional questions and provide support. And that's where it stops. No life-long commitments.

Another difference is that your advisors will be trained by ME, not a junior advisor. After thirty years in the business, there is likely no sales or business scenario I haven't faced. Together, we quickly break down any roadblocks that may be holding them back, and I guide them to the success they have always wanted to achieve.

Advisors don't have time to waste. They want results now. I deliver a roadmap that works.

Serve more clients. Make more money. Have more freedom.

Advisors Can Start Today.

Add the Elite Advisor Success System to Your Corporate Training

Option 1

Referral Partnership

Every advisor referred gets $500 instant discount

- Advisor is responsible for cost of program
- You receive a special referral code for your advisors to use
- Advisor using your code will see $500 instant savings
- No minimum or maximum logins

Cost to Advisor – $2495 [retail $2,995]

** The total program value is over $10k in course materials including video, audio, printables, and live consulting calls. We are introducing it to advisors at a discount for a limited time.

Option 2

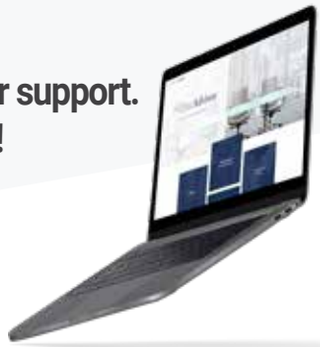
Corporate Bundle

Invest in your advisors to train at larger savings

- You invest in co-branded training for your advisors
- Co-Brand training: "XY Financial Powered by Botsford"
- 6 months support for advisors (+6 months as Alumni)
- All Premium Course Updates included:
  (new quizzes, presentations, audio, videos, materials)
- Minimum login purchase of 50 is required
- $1000 saved for each advisor login purchased

Cost per Account – $1995

Option 3 – White Label: The entire EASS with your branding and our support. Currently in production. Look for availability later this year!



Speak with a Team Member

Call Today: 866-846-4943

What Advisors Are Saying...

"I want to share with you an example of how your Secret Sauce really works! I seemed to be in a rut of prospects saying no to our planning services. My closing ratio was very poor, and I was having a hard time pinpointing the reason. Then I listened to Erin's Secret Sauce course and revamped my approach talk. Simply by tweaking my approach to include Erin's disturbing tracts, I had several prospects convert to clients and my closing ratio improved overnight. Thank you for sharing your Secret Sauce with me!"

– JF

"I would highly recommend this course for anybody and implementing just a few of these ideas are sure to increase revenue. Small ideas that are easy to implement to big ideas that will truly make you think of how you are running your business. Erin's openness about her business and career was a breath of fresh air and truly appreciative. Erin absolutely takes the right approach in running a financial planning business!"

– BVH

There's never been a better time to start.

Call Today: 866-846-4943

"Thank you for an amazing experience! I am a goals-driven advisor, and a firm believer that you get out of training as much as you are willing to put into it. When I signed on for the Elite Advisor training, I was looking for some take away points I could use to take my business to the next level. What I received from this training has been so much more!"

– Erica G.

"I am so grateful that I was able to participate in Erin Botsford's Elite Advisor Course. My eyes have been opened to a whole new way of thinking and acting. Through this course, Erin helped me see what I was missing. I am now thinking completely differently and have already made changes that will transform my practice into a successful business. Erin has taught me skills that I haven't learned in the past 20 years of being in the financial industry. They are game changing skills! I can't wait to see the transformation in my company as I implement the many tools that I learned from Erin. This course has been priceless to me! Few trainings have the power to change your future. The Elite Advisor Course is the training that will rock your world and help catapult you to levels you haven't even imagined yet!"

– Regina H.

"Erin's class has helped me to refocus and get back to basics. What makes this even more unique is her ability to weave in and remind you that your business should feed your life and family, not the other way around. I can't recommend these classes enough!"

– Andrea P.

About Erin Botsford

A Barron's Top 100 Independent Advisor & Top 100 Women's Financial Advisor, Best-Selling Author, and Founder of Botsford Financial Group, Erin Botsford is the authentic rags to riches success story. Beginning in the late 1980s when there were practically no mentors, advisors were given a few weeks of sales and product training and then sent off into the trenches to fend for themselves without many tools.

Unfortunately, over the years it seems little has changed; the attrition rate for advisors is just as high as it was 30 years ago. Erin has big plans to turn that statistic around.

I believe if advisors follow the right model, they can grow their firms into self-managing businesses that allow them to serve more clients, make more money, and have more freedom.

I started with nothing, and as a struggling advisor, I remember what it was like working seven days a week, burning out, and wondering if it was all worth it. I didn't take a day off or a vacation for the first seven years! In complete frustration, I sought out mentors and coaches but with each, something was missing. With each coaching session came a blueprint and tasks to do, but no picture of what success looked like using it!

That simply wasn't helpful. I've tried it all and I've discovered what works and what doesn't. I've spent the time and money testing and trying out the tools and action steps so your advisors don't have to. I'll only give you and your team what I know can deliver results.

My Promise to You

I believe if advisors adopt a new mindset and a solid work ethic, by modeling what I did to build my business, they too can reach new levels of success they never thought possible. Whether they participate in my online course, read my book, join me at a speaking engagement, or come spend the day with me, I will only give them insight and instruction that I know works.

I will hand your advisors the exact tools and resources we use at my firm every day. Everything they learn has been tested so they don't have to make the same mistakes I made. Your advisors can have what I have in a fraction of the time. Essentially turning decades into days. That is my promise to you.

Let me help your advisors build more than a list of clients. Let me help them build a business that confidently allows them to serve more clients, make more money, and have more freedom.

– Erin Botsford

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