

Elite Advisor Success System™

Advisor Successes & Testimonials

1) Jeffrey B.

"I wanted to thank you for the Spend the Day program and all the support material online and in your manual. Before I came to your event my gross income was **\$346,048** in 2017.

My Operations Manager Gina and I came to your event in **2018** and we ended the year with a gross income of **\$676,564**. We have continued to integrate more of the processes and ideas you shared and in 2019 our gross income was \$1,158,787 and in **2020**, even with COVID 19 and the lock downs, we took our gross income to **\$2,297,010**.

We still need to integrate more of your teachings, I am sure as we do, we will be able to **double our income again.**"

2) Vicky C.

"We began incorporating some of the Botsford Methods and "disturbing tracts". We have already seen a **big jump in revenue. We will make more by the end of February than we did last year in a 6-month period.** We are excited to move forward with your guidance and appreciate all the help we have received so far."

3) Tim H.

"I went from having a below average year to **closing 2 big cases** this week and now **will have my BEST year ever.** I want to let everyone know, it wouldn't have happened had I not stayed in the mix (with Erin).

Also, by the way, I'm realizing there's no reason I can't do 6-10 of those a year. And if I pull that off, 6-10 accounts at 5mm average - **I'm going to 10x my business in 3-5 years...** Thanks for all you do and glad to be back."

4) J. French

"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!"

5) David J.

"I just wanted to take a moment to let you know I just completed a new coaching program and was very pleased with it.

Erin Botsford, whom I have known for nearly 20 years, recently sold her advisory firm and started "The Advisor Authority" coaching program. I was one of 30 or so "pilot" advisors who completed her course over the first quarter of this year and came away very impressed.

Several things that make Erin's program different than others are:

- 1. It is designed to be completed in 5-6 months*
- 2. The cost is lower (due to the quicker completion time) and therefore more accessible to a broader group of advisors who might not be willing/able to spend \$10,000+ annually on a coaching program*
- 3. She does a FABULOUS job of sharing her best ideas and practices after 30+ years in the industry*
- 4. She is a woman and as such a great role model for women advisors (whereas the other coaching programs are owned and run by men)*
- 5. Her firm's templates are excellent and worth the cost of the program on their own*
- 6. Last fall I was "stuck" on how to compensate my team and she had excellent team compensation models that were invaluable to me."*

6) Mike V.

*"Erin - thought you might find this feedback interesting. We are going through the Prospecting and Marketing Modules.....After just this first module, I'm **1000%** confident that we'll achieve our 3 and 5-year goals. Can't thank you enough and can't wait to go through all the additional training!"*

7) Brittany L.

"I've recommended that 4 individuals in my peer group "hire" your system for their business owner development.

So glad to get connected with you...and exceptionally thankful for your willingness to share your programs and expertise with this next generation of world-changing business-owner financial-planners!

Thanks, the information has been awesome!"

8) Andrea P.

“Erin’s class has helped me to refocus and get back to basics. She gives you lessons on everything from hunting, closing the deal, hiring staff, and everything in between.

She is honest with the amount of work this job takes to be successful and unapologetic for the rewards this career offers. 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.

*The number of downloads she gives are **more than enough to make the class worth it without even counting the live time you get with Erin.** I can’t recommend these classes enough!”*

9) Erica G.

“Thank you for an amazing experience, I am so excited to see what the future holds after completing this program. 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.

Erin’s program encouraged me to evaluate my processes and hone in on streamlining them to ensure the outcomes I desire. It helped show me, from the top down, how to hire, how to position and invest in the members of my team based on their strengths and what role is the best fit for each person within my business.

*It also encouraged me to be intentionally thoughtful with how I spend my own time, and to not get bogged down in the “\$20/hour work” when I needed to be out prospecting and networking which is what I enjoy most of all. **This training is the step by step plan I have been looking for,** and I have already implemented many pieces of it over the past 30 days. I can’t wait to see how impactful this will be to my business, and the fulfillment of my goals for the upcoming year. Thank you, Erin!”*

10) Jackie R.

“My investment in coaching over the years has given me incremental growth. Different aspects of the business have been the focus with each program. After a few months they go by the wayside and sit on a shelf.

Erin Botsford's Elite Advisor program covers every perspective of our business. From our mindset to team structure and contracts, this coaching provides the details so many other programs only allude to. Processes, systems and templates are the foundation of a business that can grow and expand. My investment in the Elite Advisor full program has been much better as it covers every component of Erin's success model. The video program access allows me to go back and review the modules as I need to focus on a

particular aspect of the business. ***I have no reservations in recommending this program to my colleagues.***”

11) Jason J.

“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. Erin and her team have given me the tools to do just that. The videos, worksheets, and other material provided in the course have been very insightful and helpful to us in our firm.

Erin teaches, in this course, everything from how to think about this business to how to grow your business while you are on vacation, and everything in between.

I have really appreciated Erin's unique way of conveying how she achieved such great success and has given us the blueprint to do the same.

This course is excellent. I strongly recommend investing the time and money to take this course!”

12) Jamie F.

“I have learned from a number of financial advisors and practices over the year, and I have consistently invested in education and coaching to try to take my business to the next level.

I have never experienced a more insightful and actionable blueprint for success than the Elite Advisor Success System!

Erin is sharing with us the intimate details of how she created a world-class and wildly successful business. In the words she chooses, you can hear the years of experience understanding clients and overcoming objections.

The content is brilliant and her results speak for themselves. If you want to build a world-class financial planning business, if you want to work for a more meaningful purpose, if you want to build a team that helps you grow exponentially, if you want to increase your expertise and your revenue, and you want to shorten the time frame for you to reach your goals, then you need to sign up for the course TODAY! You will not regret it!”

13) Karim H.

“First, let me begin by sincerely saying thank you from the bottom of my heart. The courses that you have put together are truly comprehensive and with a large amount of material suitable for any size financial services practice that is looking to truly build a “financial services business” of any size one desires. The courses truly demonstrate your knowledge, expertise, skills and competency when you practiced as a financial advisor. They demonstrate your decades on experience as a financial advisor. The material that you have put together are one of a kind and I do believe that there is no

one in the financial services industry that has put together as comprehensive content as you have.

What makes your courses truly second to none, is not only the content but also the delivery of these courses. The medium in which you and Mike deliver live Zoom sessions, with group interactions and live Q&A, makes this even more unique because we get to learn from questions asked on these Zoom sessions.

Secondly, from a personal point of view, I have benefited hugely because as a relatively new practice, many of the components that are necessary to build a successful financial services business are not in place for me today. So, in my case, I don't have to undo a lot of things, as they don't exist and therefore, I can build the right components from ground up. To that point, the samples, the templates, the forms, the contracts, marketing materials, etc. that you have provided are second to none and truly a life saver; as I do not have to re-invent the wheel. These collateral pieces clearly demonstrate years of experience and expertise. Collectively, all of these can help anyone to transform their financial services practice into a business.

Finally, I am so blessed to have gone through this initial journey with you as you launched these comprehensive courses from start to finish. It is my humble opinion that you have left no stone unturned in terms of pouring ALL your 30 years of experience into these courses, including, some very personal experiences. All this ultimately saves advisors like me years of re-inventing the wheel and instead truly focus on building the right relationships in the business.

I sincerely hope that every financial practice adopts your courses as the "benefits are truly unquantifiable".

Erin, as you continue to promote these courses in building the next chapter in your life, as part of the journey of life, and supporting those kids in Zambia, I wish you the very best. May God give you the vision, the strength and finances to pursue your passion."

14) Kerina G.

"I am writing to you to share information about a class that I just completed. A couple of years ago, at our Stratos meeting, some information was given out about Erin Botsford and a Spend the Day that she was offering to advisors. Thankfully I was wise enough at that time to see what kind of an opportunity was put in front of us.

*Erica and I went to Texas for the day to listen to Erin and her team and get some insight as to how she was running her business. As a result of that class, Erica and **I were really able to quickly propel our partnership** and get some incredible processes together. So, thank you for getting her in front of us.*

I am writing to you now to tell you about this because, earlier this year she presented another opportunity to us that I think you will want to share with the XYZ partners once again.

We have grown so much and I am sure that most advisors do not know about her or this opportunity. Starting in January, Erica and I started another class that was being offered by Erin called the Elite Advisor. We started in January and finished this week.

***I must tell you that in my 13 years as an advisor and my 22 years in the corporate world, I have never attended a better or more affective class.** She is absolutely amazing. She shared so many sales ideas, organization, administrative and many more items with us. I can admit that it is a bit overwhelming trying to incorporate everything but that is also what reiterates just how amazing the course is. I believe that I can watch these videos once a month for the next 3 years and still pick up ideas from her.*

***It is not often that I will say that it is worth every single dollar, but it is, it is worth more in fact.** In addition, I think that because we all own our own business that this is probably more applicable to us then it would be if we were still in the corporate world.”*

15) Lori R.

*“I am blessed to have been a participant in your Elite Advisor Success System class and cannot thank you enough for offering this course. You have shared your professional successes and failures **and given us a step-by-step guide on how to duplicate your success within our own firm.** The kicker is, I am not even licensed to sell securities; I own a life insurance brokerage agency in the tiny state of Hawaii. Yet, the information attained from this course is immeasurable. Mahalo Nui Loa, Erin!”*

16) Michael S.

*“**I LOVE the Total Advisor Authority!** ...truthfully the kind of content that I was hoping to learn at your spend a day in Texas a few years ago. Seriously... LOVE IT!”*

17) Regina H.

*“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! “

18) Rick G.

"I've spoken with the president of XYZ Securities about your amazing course and he is all on board. We're local and we're a small firm, we have about 25 -30 Advisors who absolutely need this type of training!!

Love you and your system! If I double my income in a year, I will gift a nice check to your kids in Africa!!"

19) Renée P.

*"I wanted to write to you to tell you how much I am enjoying your Elite Advisor Course. I've been an Advisor for over 29 years and I find this is helping me to recharge my enthusiasm for my business. **This is truly a "turnkey- how to" course to build and maintain a highly efficient practice.***

I have used many of the "best practices" that you teach but have strayed away from some of them and they are what helped me cross over the million-dollar mark earlier in my career. It's great to revisit these best practices and ESPECIALLY because this comes from a true practitioner who built a huge business by following the formula.

*I truly appreciate that you get right down to business and don't waste my time with "fluff." **If I had had this Blueprint earlier in my career I can't even imagine where I would be right now.** Thank you for sharing your years of experience of what to do and what NOT to do to be highly successful. And, bless you for doing this out of love for the orphans that you and your husband are feeding and supporting- it makes the entire experience even richer! Thank You so Much!"*

20) Scott F.

"The training is amazing – I was sick today so I stayed away from family and church and I worked on your class from about 9am to 11pm, absolutely love it! Probably won't sleep tonight as I think about it all."

21) Maria K.

"I wanted to thank you for an amazing course. I wish I took this course when I first started. It would have helped me to set up my business the way I wanted and have a plan for the future vs randomly trying new things and learning from my own mistakes.

*The flow of information from one course to another was exactly what an advisor building a business would need. **I don't know of any other course that shares so much information, in such a short period of time and without unnecessary fluff.***

In our industry most people don't share information well so this course is definitely different. Again, thank you for all the information you shared. I know it will help many advisors build the business of their dreams."

22) Sarah M.

"I'm just very grateful I was chosen as a founding member.

*I'm very grateful to be connected to you and to be taking your course. I've known for a while it was time for me to increase to a much higher level and to grow/expand my vision and dreams. I've been working on it diligently for 2.3 years now and am so amazed at how God is visible in my journey. One think builds upon another! Thank you Erin! **This was amazing and a life changer!!**"*

23) Lana M.

"The videos are perfect and there is a lot of material to go over in this module. In fact, the videos have been a fantastic learning tool since we can stop reverse go forward replay as often as we wish.

***Absolutely one of the best** - making me realize how much more we can improve our communications and train our assistant. Also gave me more insight into hiring the right match for our practice.*

Thanks so much for your guidance and have a beautiful day."

24) Brian VH.

"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!"

25) Bee Lee

"I just finished the Elite Advisor Success System course with Erin Botsford as part of the founder's group. Erin's course covers everything an advisor need to run a very successful business, from getting clear about what you want from your business, to prospecting and marketing, how to conduct client meetings, to building your team, running the business day to day, to the role and tasks of a highly effective Assistant.

Erin does not only discuss the importance of all these different subjects. In each module, there are detailed processes and procedures including operating manuals for one to follow.

For example, Erin provides instructions on conducting client meetings, complete with a detailed Internal and external agenda and explains the reasons to have both.

Erin also provides a group phone call session for each module in the course. I have found these calls extremely valuable in clarifying and cementing the course concepts.

This is a unique course that one can follow in a step-by-step manner to improve/build a successful business with. The processes that Erin shared with us in this course really are implementable by any advising business. I have found many of them very useful in helping me to get 'unstuck' about implementing some operating procedures for my business.

I think many advisors, new or established, will find this course very beneficial, especially taken with the group phone calls."

26) Susan S.

*"I finished the 'Secret Sauce' course on the plane over the weekend (the transcripts work really well for me) **and it is magnificent, Erin!** I have always known you were a hard worker but what an impressive amount of work you put in to not only the course but building your company to a high level!"*

27) Teresa R.

"While attending the Accelerate Conference, Erin Botsford caught my attention. She presented her Elite Advisor program and I heard MY story of trying to grow my practice. It was everything I wanted my practice to be and she assured us if we "model" her, we can grow to reach our goals. I enrolled in her course in May and have learned so many things that make my practice easier.

*I just wanted to be sure that you **know Erin has the "Secret Sauce" to help advisors grow their practice.** I am so glad I met her at the conference, otherwise I would not know of the Program she offers. I encourage you and others to spread the word about Erin and her remarkable program, The Elite Advisor!"*

28) Gretchen Z.

*"I have found the Erin Botsford course to be most helpful. The concepts in this course-process, videos and material as a whole **is helping to launch our practice to the next level.** We are getting our fee-based planning off the ground because of the tools within this course.*

*Thank you for referring us to this program; it has been most helpful. **I wish I had this years ago.** We would not be on this path of Estate planning without Erin's material. I needed it for myself and our RSA broker to add value to our clients experience but especially as we recently added another planner that needed a process for us to educate him on and develop a better understanding of the psychology of the client interaction.*

The material gives insight into how to overcome a lot of the mistakes I have made by not communicating up front to the client what is necessary to avoid pitfalls to achieving both of our goals. Thanks for referring me to this valuable program!”

29) Steve C.

*“Wow, I watched most of these videos at the tire place yesterday and was up late trying to finish. **This is good info!** I think the power of your system is the pain points (don't remember what she called them...the 22 points) that you go over in the first appoint to close them in the first meeting.”*

30) William C.

*“I really enjoyed the course and all the materials. **Erin's course allowed us to put more formal systems and processes.** We used to charge our financial planning fee and present the plan with all the recommendations.*

We have since changed it to have the investment planning and goals and values meeting first., then we give them the answers to all the other items we found, such as incorrect titling, no POA, etc. It makes them more likely to move the money to us to manage. I have already had three potential client meetings using this format.”

31) Kathy and John S.

*“I have been in the investment business for close to **4 decades**. I have used other coaching services that were good, however, **Erin Botsford's Training System is the absolute best!** I wish I would have had this opportunity when I started in the business.*

*Erin provides a step-by-step program with full support from her and her team. She is happy to share her “Secret Sauce™” on how to grow a successful practice, in fact, she wants to see other advisors succeed. Erin's processes are easy to implement into your business. **I can already see the difference it is making to mine.**”*

32) Franco P.

*“Our team recently completed Erin's coaching program. **I would recommend it to any FA or team looking to grow!** Also am positive that if you asked any of our team members their opinion, they would say the same. Erin's depth of experience is an invaluable resource. Her model is adaptable and duplicatable. Thank you, Franco”*

33) Tatyana B.

*“**Erin is AMAZING**, and the Elite Advisor Success System is an invaluable resource. The way Erin presents the information makes it easy to understand and implement.”*

34) Joshua B.

*“If you think Erin’s speeches are eye opening, going through her program and confidently taking the steps to build a team around you is life-changing. **I believe her consultancy program is the best money I will ever spend.**”*

35) Lawrence D.

*“**The Secret Sauce™ and Approach Talk modules are excellent!!** Erin gives some amazing insight into her process and removes so much of the mystery surrounding how the more successful firms can command a planning or retainer fee. Her process makes it clear to a prospect that they are working with a professional. Thanks!! I can’t wait to get to the next module and to implement what I am learning next year.”*

36) Peter S.

*“I truly find this course valuable and do believe if we follow your guide we can execute and meet our goals. My **three-year goal for myself is to be a 1 mm** producer. *Currently close to 350k.*”*

37) Greg H.

“Your story is fascinating, Erin. Our backgrounds are very similar, and two things jump out at me in reading your book.

- 1. Good grief, you’ve paid your dues. I thought I was driven to succeed, but there’s nothing to compare to what you’ve done to get where you’re at.*
- 2. You’re extremely pragmatic. If it works, you do it, and if it doesn’t, you don’t. I have spent tens of thousands of dollars and thousands of hours of time on marketing and prospecting methods that haven’t worked well or haven’t worked at all.*

I’m looking forward to reading your material on prospecting. Thanks for all you do. I’m looking forward to the next call. Have a great day!”

38) Larry D.

*“What a comprehensive program Erin has put together!! Tentatively, I have a phone meeting coming up in the next week or so with a professional baseball player’s spouse. Having completed Erin’s course, **I feel far more confident that I will stand out from the crowded field of advisors** she has spoken with by not leading with investments or insurance. I’m going to go back and revisit the module on Disturbing Tracts. Your course is absolutely amazing! **Achieving a 10X enterprise is clearly insight now.** Thanks a million.”*

39) Paige P.

*"I would highly recommend the Elite Assistant course. Erin and Jennifer Mann do an amazing job of sharing their best ideas and systems that have contributed to their success. Our team is currently in the process of adding these systems to our practice and **we are confident they will help catapult our business to the next level**. Erin's depth of experience is an invaluable resource and to be able to learn from her was a privilege."*

40) Melissa K.

*"Your (Elite Assistant/Team Member) program was a **real game changer** for us."*

41) Jessica B.

*"I just wanted to say hello, as I am part of Erica's back-office team **and your name has become a verb in our workplace**.*

Your thoughtful process and insight are going to help catapult Erica's business. Your training and openness, along with Erica's own drive and focus makes it a pleasure to work with her and absolute fun to be part of her growth. Additionally, helping her compliments my business too, and that helps me achieve my own goals.

So, thanks, for your drive and tenacity back then so you could impart your knowledge on us today."

42) Peter S.

*"I used it (The Secret Sauce™) during a referral prospect call from my CPA, the part about starting with protecting what you have and **the disturbing hot buttons worked as advertised**. The prospect said I really appreciate how you look out for your clients; not one that I've spoken with has brought that up."*

43) Michael S.

*"Nice job on your Fear and Worries Exercise video, Erin! **The month of March has been one of the biggest months I've had so far**. We are working virtual and are crushing it."*

44) Hardt B.

*"I am grateful for all the time and energy the two of you poured into making Advisor Authority **an incredibly robust program**. I wish I had been introduced to the program about 25 years ago. Better late than never! Thank you nonetheless."*

45) Barry J.

*"I did want to compliment your organization for the great series. September will be my 39th anniversary in our great industry. I mention this to **again acknowledge Erin's presentation as a top 3 for my time as an advisor including 23 years as a field leader.**"*

46) Michael W.

*"Thanks for the feedback. Much appreciated! **This stuff is great and is making a difference!**"*

47) Liz W.

*"Thank you for sharing your eulogy exercise. I had written one but had not considered writing different ones from different perspectives, such as a friend or a client...**This is the best training I've signed up for, and I've gone through some of the best known!**"*

48) Kathleen O.

*"THANK YOU!!!! **This course is fantastic**, and I am only in the second week! I am loving this content!!!! Erin is a blessing. Now I won't have to stumble along like I have been! I especially love the "**Disturbing Tracks**"...**Genius**, is all I can say. Again, I cannot thank you enough! I know now I will have the tools and knowledge to change my life and help others!"*

49) Brooke D.

*"**The Elite Advisor System™ is priceless.** The only thing I would change, is that I had this earlier on in my career. Erin really does include everything you need to run an extremely successful business. I am so thankful...**My business has been completely streamlined.** I could not thank you enough for this valuable information. I will continue to tell my colleagues and fellow advisors about this course as it is money more than well spent.*

I also really appreciate the latest checklist, I plan on booking appointments/phone calls with all my clients to review this with them. It is an excellent idea. Thanks so much!"

50) Hoyt R.

*"Your training has already helped us increase our Financial Planning Fees (I think we are charging some of the highest Financial Planning fees through XYZ) and **more than paid for itself.** Of all the training I have gone through in my 29-year career, **yours has been the most productive in the shortest amount of time.** I am really excited to build a seven-figure firm!"*

51) Regina H.

"I also would like you to know about my coach and mentor, Erin Botsford. As you know, Erin is an extremely successful Financial Advisor and business owner. Erin sold her practice a few years ago and is now coaching FA's like myself. Half of her fees go to support the Ebenezer Foundation which supports impoverished and orphaned children in Zambia. So, I know her heart is in the right place.

I have been an FA for 24 years. I came into the business with no family money, connections or big team to train me. I basically had to figure this business out for myself. Over the years, I have attended many different classes and trainings aimed at improving myself as an advisor. Almost all of this training was provided by people outside of our industry. Plus, not a single one of these workshops taught me how to be a business owner. Then, I met Erin Botsford. My world has changed!

*I joined Erin's coaching course about 18 months ago. **I have learned more from her in the past few months, than in my previous 20 years in the business.** Erin's course has been instrumental in changing how I approach my business, my clients and my prospects. I have been able to rebuild my foundation and restructure my practice to grow my business. Erin has shared her procedures, templates and scripts with her students as well as her "secret sauce" to running a successful advisory business.*

As a result, I have made many changes to my approach as a Financial Advisor, business owner and employer. I am amazed at all that I have learned and have been able to adapt to my own practice. Now that I have rebuilt my foundation, I look forward to the growth that I expect to have over the next several years.

*Erin's coaching has been instrumental in helping me create my vision for the future. I am deeply grateful that I had the chance to participate in her program. **I think more Financial Advisors need to learn from Erin.** She can guide us to more profitability and growth than we could have dreamed of while making us better Advisors to our clients. Erin is truly spectacular.*

Not only is Erin a successful advisor, she is also a woman. In my 20 plus years in this industry, I have never had a female advisor as a role model, mentor or coach.

As you know, it is a male-dominated industry. It even more rare for a woman to be a superstar and be held in as high esteem as their male counterparts. Erin has certainly worked hard to earn her spot as a leader in our industry. I think it would be an exceptional opportunity for all XYZ advisors to have access to Erin's training.

Most importantly, I believe the women and other diverse advisors would benefit enormously from Erin's coaching. If we see someone who is also diverse achieve what Erin has achieved, it is easier to believe that we can also have similar success."

52) Peter H.

*"I've begun using the Approach talk (from the Secret Sauce™ Course) **via Zoom** and so far, it has led to **my first closing with a prospect!** I'm making some PowerPoint slides b/c it's hard to draw using a mouse! I can see how once all this is internalized how all my future prospect meetings will go."*

53) Mary S.

*"**I just completed the Secret Sauce and WOW!** I love how you lead with being the Financial Director and working your way through the main areas of focus. In fact, I scared an existing client so well he hung up with me yesterday and scheduled an appointment to set up his family trust. Man, how much free advice did I give away over the last 6 years and it just wasn't implemented!*

*As well, the biggest thing I gained from the course is **CLARITY!!!** I was charging financial planning fees a la carte (about \$500 on average). Now every new client **MUST** sign up for Financial Planning and my flat fee is **now \$2500 to start!!!!** I thought it would take me YEARS to get there but after modeling your Financial Planning Process checklists, there was no way this wasn't worth AT LEAST \$2500 AND I have had 2 prospects SAY YES last week so I know I am on the right track!!*

***Now I can SEE IT!!** I was at \$313K LY, on track to be at \$415K this year, next year, goal is **now \$800K - \$1M.** Why?? By adding 10 new financial planning clients a month x 12 months = 120 x \$2500 = \$300,000 in **ADDITIONAL REVENUE** I was NOT collecting, plus, if I grew my AUM at the basic \$100K per year like I had been, easily reaching \$800K, but I want to go for \$1M!!*

Thank you Erin, truly!! THANK YOU!!!!"

54) Prael H.

*"Thank you. **I surpassed last year's GDC last month and the pipeline looks pretty good. 100% virtual and in a pandemic.** I am sure being a part of your **Elite Advisor** program has helped tremendously. It is my intention to stick with you for the near future. I have so much more to do and learn. Thank you, Erin"*

55) John R.

*"Thanks, Erin. **Without question, you are the most brilliant financial advisor/teacher I have ever had the good fortune to learn from.** Your massive amount of relevant experience comes through in solutions that work."*

56) SteVan G.

*"By the way, I've used your **Thanksgiving Letter** idea now for over 15 years!... **A BIG HIT with clients!** I forgot who I got that idea from. :) Thank you Erin"*

57) Laura S.

*"I participated in the **elite advisor** coaching program this year. Given my prior coaching experiences in the past, I wasn't sure how this would benefit my team, my clients, and my practice as a whole. Bottom line: Erin's program was full of practical advice, best practices, concrete recommendations, and more specific templates and takeaways than one could imagine. Definitely valuable regardless of whatever stage in your practice you may be in."*

58) Jeffrey B.

*"Before I came to your event my gross income was **\$346,048** in **2017**. My Operations Manager Gina and I came to your event in 2018 and we ended the year with a gross income of \$676,564. We have continued to integrate more of the processes and ideas you shared and in 2019 our gross income was \$1,158,787 and **in 2020**, even with COVID 19 and the lock downs, we took our gross income to **\$2,297,010**."*

59) Heidi G.

*"I just had to share a **success story** because of **The Elite Advisor coaching**. I have a client where I've struggled to gather the rest of their assets and complete the financial planning process. Long story but he mentioned changing insurance agents and the agent was recommending \$1 million in umbrella coverage.*

*You and your coaching teed this up perfectly for me and I used your script and recommendations. The punchline is he was so impressed with my knowledge, we have scheduled a Zoom meeting to complete the financial plan and they are moving the remaining assets to me. **It was like shooting fish in a barrel.....***

Thank you, thank you, thank you for the incredible coaching!!!"

60) Junko H.

*"I memorized your **Approach Talk** this week and opened a case this morning. **It worked!** I charged \$3,500 for their plan. They have around \$1.7MM investable assets.*

Originally the wife said that she is so happy at UBS since the guy at UBS is so good with her mom. He is like an angel and has wings behind his shoulder and she said that she has no plan to change the investment arrangement.

Then I started to “disturb” (**from the Secret Sauce course**) and at the end, she said that she wants to go through our planning process! Thank you so much. **It Works!**”

61) Michael R.

“Catching up on the Nov 12 (**Monthly Q&A**) call that I had missed. I find great value in all of the content of the calls, but the last 10 minutes of this call was **AWESOME**. The question was “how do I overcome the struggle”? Erin spoke to meeting Amy, learning the disturbing tracts and the reason advisors may struggle...rejection fear. Erin, I thought you tied the prospecting + disturbing tracts together in a wonderful way. It was like a 1-2 punch. Get out there and disturb...Get out there and disturb...repeat.

And the analogy of a performance was perfect. Once you are in the front stage you better know your lines developed via backstage (mastery of craft). Thanks, Erin, for putting these (**mastery**) calls on. **They DO make a big difference and ADD value.**”

62) Vicky & Wayne C.

“My husband and I are financial advisors. We have been searching for several years for a consultant that would teach us the skill sets necessary for us to grow to be a more complete, comprehensive service for our clients and community. Time and again, we found ourselves leaving training sessions with various professed experts feeling as though we lacked the true direction and instruction necessary to reach our goals.

That has changed. Once we joined **Advisor Authority with Erin Botsford**, we quickly realized we had found that very direction and instruction we’d been searching for. The modules and their plethora of content are easy to navigate and understand while still specific and in-depth.

I feel confident in the ability to use the resources given by Advisor Authority to answer any question that might come up, as the training given is incredibly accessible. Thanks to Erin at Advisor Authority, **my husband and I now have a path to success**—without needing to work longer or harder to optimize earnings—laid out for the future of our company.”

63) Jason J.

“I am up over **60% in revenue for Q1 2019 as compared to Q1 2018** in my business. The ideas and strategies that you have provided through your course have been a major part of helping grow my business!”

64) Preal H.

“Erin, your Thanksgiving Letter is awesome. One client told me she cried. I also sent top clients flowers and have received **8 referrals** and brought on **6 clients** from it since Thanksgiving! So grateful for you!”

65) Carolyn H.

"I am currently enrolled in the Elite Advisor coaching program by Erin Botsford. This course provides step by step guidance in how to refine and elevate your practice. It shows how to differentiate yourself from other advisors and provide expertise in a holistic environment that goes well beyond investment management.

I recently had an opportunity to meet with a high-net-worth individual who sold his business. Erin's course gave me the tools – and the confidence – to prove to this individual that I was best suited to help him navigate the next phase of his financial life. In our initial phone conversations, he told me he was probably going to spread the money among four advisors.

*At our second face to face meeting, **he gave me a check for \$15 million**, which was half of the proceeds from the sale of the business. He will receive another \$30 million in 3 -5 years and you can bet we will try to get all of that!*

*I **highly** recommend it for all advisors. There is no need for advisors to struggle and re-create the wheel when Erin has already done it and is willing to spoon feed it to us. I have been an advisor for 25 years, but this course has truly changed how I approach prospective clients and given me the confidence to know that I can compete and excel in the HNW world."*

66) S. Gates

*"Botsford Elite Advisor training was the **BEST Investment** for my practice from an Advisor Peer All-Star with results that speak for themselves. Erin is real, authentic, honest, intelligent, and a straight shooter that opens up how she did it; now, she's sold her practice and wants to give back. The question, is are you willing to do what she's done?"*

*With the plethora of videos, Templates, Letters, Scripts and all the "How-To's" and ongoing Coaching, that all becomes DOOABLE for you. My practice revenue at the time of consulting with Botsford Elite Advisor Training **was \$450,000 in 2015**. As of 2020, my **practice revenue is \$1.472,850**. Thank you Erin. A dynamic practice growth platform with perpetual breakthroughs' that worked! :) It can work for you, IF you work "Botsford Elite Advisor Training."*

67) Arlene A.

*"I just completed **the BEST coaching program** I have ever taken for my professional career, The Elite Advisor Program by Erin Botsford. I have worked with several coaches & program during the past 10 years and **this has been the BEST & most comprehensive & personalized program ever**. This definitely tops my HIGHLY RECOMMEND list!"*

68) Michele I.

“Erin and Mike, just wanted to send a HUGE thank you for so much valuable information! It has changed the way I’m looking at our business and how we will work with our clients going forward. We are so excited that a huge amount of growth is in our near future.

*I just wanted to let you know what a valuable resource the Elite Advisor coaching program has been. It was a six-month course and **completely changed the future of our practice**. One of the many great things about the entire course is that there are step by step instructions/processes to build our businesses to the extent that we want to. Everything is laid out for us and every piece of information whether thru a video, audio or PDF file has been provided.*

*Erin Botsford has been gracious with her time in providing answers to all questions that any of us had and even taking the time offline to help me personally with questions that I had pertaining to particular situations. **The more advisors use her formula, the better off each of us will be but also our industry.**”*

69) Kelley T.

*“Thanks for the Secret Sauce! We **sold 2 plans** recently! *After not charging for a few years!*”*

70) Michelle G.

*“I just closed my **first-ever \$7 million dollar case** and the funds have arrived. It’s the largest client I’ve had so far and I give credit to Erin and her process, namely using her Disturbing Tract strategy, and having confidence to move up-market and can’t wait to see what’s next for us.”*

71) Peter N.

“I have a client I’ve managed around \$500k for the past 4 years. He and his wife own a vast amount of real estate. Net worth north of \$50 million. They decided they wanted to start doing some estate planning (early 40’s) and other financial planning related to setting up a family office and restructuring some of their RE holdings.

*I just signed them for a **\$20,000 annual financial planning retainer**. *Without your program, I wouldn’t have had the confidence to put that level of retainer out in a proposal.* So, thank you very much!!! I appreciate everything you two have done for my practice.*

72) Glen S.

"I joined your program on June 23, 2021. Prior to joining your program, I had previously charged a separate financial planning fee just once some 10+ years ago but never did again for one reason or another ...mostly my aversion to the computer software, truth be known.

*While XYZ's Financial Planning Dept. has encouraged a separate financial planning fee for a long time and certainly provided all the rational reasons to do so, **I will attribute your coaching to teaching me how to truly "sell" the process and the plan.***

*I billed my first separate financial planning fee of \$2500 on July 29, 2021. I have received **a total of \$21,500 YTD in 2021** with engagements ranging from \$2500 to \$5500. **Not a bad ROI !!**"*

73) Vitaly N.

"I'd like to tell you that Erin's course has helped me tremendously. Here's how: it led to rebuilding my business and myself as a person and a business owner. Erin's course has indeed changed (1) my mindset and (2) approach to the business. I am no longer a generalist and I have clearly defined my ideal client.

*I believe that primarily due to the shift in my mindset and approach to the business, I was able **to land three big clients over the last few months who have a net worth in the range from \$4M to \$8M.** Now, thanks for the Secret Sauce module, I landed two clients in just one meeting and the other one over the phone. To summarize, Erin's course is amazing and I am very grateful for taking it."*

74) Carolyn N.

*"Thankfully, we are growing by **leaps and bounds.** I am pleased to report that our **Net New Assets** have **increased by \$26 million** in 2021! Much of this is due to our change in mindset and being able to articulate our value to our clients and prospects. Many thanks to you and Erin for leading us down this path!"*

75) Michael W.

*"My team finished 2021 at \$556,300 of gross. When we started with the course in January 2020, we had just done \$332,407 so we saw a **67% increase in 2 calendar years.** We are on track for my 3-year goal of \$800,000 and 4-year goal of \$1M."*

76) Mary S.

“Our AUM and Revenue **DOUBLED in 18 months!** I am more confident than ever charging for financial planning and earned **\$53K in financial planning fees in year 1** and \$20M in AUM. Now, I basically tripled the business in 3 years and thanks to Erin we’re up 57% this year 2021.”

77) G. Starr

*“Implemented a separate financial planning fee in June 2021. At the end of 2021 = **\$21,500 in separate fees.**”*

78) Regina H.

“I’m very happy because I’m **up 28% in revenue** because I focused on charging financial planning fees and renewing them. My book is almost written too. Many other programs out there are theoretical and they weren’t successful FAs like Erin. There is so much more value here. I am more confident and growing my business because of Erin!”

79) Jeff P.

*“Started the class in 2020 and had our **best year ever while working the least amount of hours/days ever** in my 17 year career. I’ve been able to incentivize my staff and turn over 80+% of all activities to them to handle.”*

80) Matthew M.

*“I’d like to share a success story using Erin’s **“Secret Sauce” closing strategies.** I was referred to someone with \$2.5M in AUM and in the first conversation, I was asking the questions Erin taught me and all they said was ‘this is what we wanted to hear.’ And **they left their former advisor to join us right after.** We never even discussed our investments.”*

81) Liz W.

“I just wanted to be sure you and Erin know that I am getting HUGE value from the program. On the January call, I committed to raising my fees. I have raised them about 15% since our last call. Not as much as I ultimately intend, but I’m making progress.

*My last year’s results **turned out better than I thought** once the money transferred over. **New assets were \$19.3million.** I have \$7.6M so far this year in the process of moving over. Thanks so much!”*

82) Bruce M.

"I say absolutely that joining your program has already been one of the best biz decisions I have ever made. While my goal selling price for my biz isn't that big, it has a big multiplier of my current production, so I was being aggressive. But, as you know Erin, a "Worthy Goal" is a great thing!

*With the exercises in YOUR program that I have already completed plus what I see coming, you will have jumped ahead of XYZ in my Pantheon! And, because XYZ isn't coaching as an independent, **it was only YOU Erin who helped me immediately with my most important biz goal of my biz career, selling my biz.** THANK YOU!"*

83) Danyell J.

*"Erin's course helped me secure a new **40MM** relationship! We're so grateful."*