

Elite Advisor Success System™

Advisor Successes & Testimonials

1) Jeffrey B.

"I wanted to thank you for your training 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" (from the Secret Sauce). We have already seen **a big jump in revenue. We will make more by the end of February then 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!*

*Erin, you are a huge ‘difference maker’ for me. Just **today a \$6 million prospect committed to my team** and I made the cover of XYZ Business Magazine. This is not an accident! You are my hero!”*

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."*

84) Kathy H.

*"May to May we are up \$1,110,533 or **42%**! Pushing 3.8mm now....all while my #2 was working part time and then out on Maternity leave. Am so very grateful for these Mastery Classes (live calls) with Erin.*

*Processes are being completely revamped right now because the practice was 1.5mm T-12, in May of 2017 when we came to RJ. I knew that things needed to change in many ways a couple of years ago when I signed up for Erin's course. **And it was worth every dollar.**"*

85) Eric G.

*"Firstly, I want to thank you for the impact that your **Mastery course** has had on my business. I know I don't talk very much during our calls, and often I'm watching the recordings afterwards, but you've really helped me to change my business in a huge way. You've helped me **raise our minimum from \$250K to \$1M**, and our up-front **financial planning fee has gone from \$1500 to \$3500**. Just as importantly, you've shown how to hire and train new advisors, and we are in the process of bringing on two new salaried advisors this year.*

Secondly, I just got back from the Annual Meeting of MDRT last week. Oh, that's another thing you helped me do, I've now qualified for Top of the Table two years in a row. So, thank you for all that you do."

86) Roper F.

*“Erin, you have been a big help to me the past two years. I joined you in Jan 2020. My team transferred from WFA to RJA in August 2019. We are **up over 60% in revenue in less than 3 years!** Also, retired one team member and just hired another team member. Thank you.”*

87) Dustin G.

*“Erin, I’ve been in the training **for just 5 weeks and I just closed a \$44,500 recurring financial planning fee!** I’ve never even charged a \$1000 fee before for my planning and got in front of a \$40M prospect. Using the “disturbing tracts” techniques from the Secret Sauce, I did what you told me...to quote ‘the biggest fee that would come out of my mouth’. Guess what; he never even blinked. This is a testament to the training and I’ll never worry about quoting fees again; I’ll never have a hesitation again thanks to you and your training.”*

88) Liz W.

*“I thought you and Erin would like to know I’m at **\$14.5M YTD** (through July). Not that long ago, **it would have taken nearly 3 years to gather \$14.5M.** I’m focused on continuing the momentum through the end of the year. Thank you!”*

89) Cory P.

*“I had one of Erin’s meetings called the Visions & Values meeting with a player and his wife after our call this morning. They **rattled off 10 referral names** in the blink of an eye. 3 of them with major football contracts...Let’s go!”*

90) Andrea W.

*“I also wanted to share a little success story with you - **I charged my first two planning fees (\$1200 minimum) this past week!** Both prospects were HENRY’s and will have future assets that meet my newly established account minimum of \$500,000. So a BIG THANK YOU for helping me to try something new!!! They loved, loved, loved the services outlined in our meeting. I wonder if I should have charged more??!* 😊

91) Jeri B.

*“Sounds great! Thanks, Mike. I have a lot to learn from you and your team! **I plan on going to 10x in 3 years...**I have faith your program will help get me through this brick wall. I have several clients/prospects who have sold or are selling 10-30M+ businesses this past year. With smaller clients, my closing ratio is much higher. These clients have yielded less than 1/2 being closed...I have allowed them to procrastinate! You and Erin are exactly what I needed at exactly the right time!”*

92) Don M.

*“I just landed a **9-figure plan!** And I am incorporating as much of the secret sauce into what we do as we learn it. And I wanted to share another success story with you. One of my eight-figure clients, a plan and client only, insofar as they have very little liquidity other than operating capital for their business entities, met with me this week and together with husband and wife we went over the ‘what it is we do’ and how we do it. Envelope story.*

We then started quantifying and identifying risks. Out of that meeting will be a set of long-term care policies, asset-based, that he and his wife will pay for his mother and her mother and father. We're also meeting with his property and casualty agent on one of his properties, worth three and a half million and looking at the protection structure there. That will then lead to a further discussion of the estate issues that we identified.

*In a nutshell, and you know this, **your system works.** I'm really impressed. I'm really grateful that you came into my life and I look forward to many years of working together with you.”*

93) Katrina L.

“Yesterday, I followed another piece of your amazing advice and met with my client in the conference room. Greeted her in our lobby, walked her into the conference room, extended the head chair and said please, have a seat. Her face lit up, she stood a little taller and she said, “Me? The King of the table?”

She had a big smile on her face and it just made me realize how much this small gesture meant to her. Also, thought it was interesting she opted to use the word “King” instead of “Queen”. Her word choice seemed to say, “the man/king is supposed to sit at the head of the table”.

*Oh...and she decided to move forward with my Premier Plan – most comprehensive plan. So that brings me to **6 plans in five weeks.** I am **over 7x ROI in just 6 weeks!** Thank you!*

94) Mario G.

“Since reading Erin’s book, I have been taking people to lunch almost every weekday, attorneys, accountants, CPA's, etc...The referrals have started to come in.

*One is a **9M Net worth with 7M in cash,** he just sold his business. He had met with Merrill and Wells Fargo people and decided to go with me since I did the FD, risk management, etc... drawings, exactly as explained by Erin. Disturbing tracts, the whole deal. He said he’s doing business with me because the others did not mention any of the risk management and estate planning stuff (he has never met with an estate planning attorney, no trust, will, etc).*

*Met with another referral, did the approach talk... 20 min after they left my office, **I had \$750k in IRA statements that they are rolling over**, plus they are opening a SEP to max out this month. I am very excited :) Thank you!"*

95) Tamala W.

*"By the way, I have a success story to share with you since I won't be on the next mastery call due to attending a conference. I followed the steps (as best I could) in **Erin's Secret sauce model**. I had an appointment with a couple yesterday. I set the stage, shared my story, used the approach talk and disturbing tracts and **sold my very first financial plan ever!**"*

Then I got a 2nd one soon after. This client is a retired physician who is single and came in as a referral from an existing client. I explained the value of the financial plan and disclosed my fee and she signed the financial planning engagement by the end of our meeting! I feel really good about using Erin's system!"

96) Jason G.

*"Thank you! **The course is amazing**. Refreshing to take a sales course that is hardcore sales. Really enjoying it."*

97) Bill V.

"Met with a wealthy sophisticated couple today and wasn't disturbing much-had a good portfolio, estate planning was thoughtful, everything titled correctly, umbrella policy, 529s, little light on insurance but not much.

At the end I asked about what my aunt calls "the bimbo clause"- if the surviving spouse was required to have a binding pre-nuptial clause and used the example of my wife hiring marrying her young personal trainer whose children would get my half of my estate.

*Boy did it strike a chord with the wife and the meeting changed on a dime. She said "**Can we hire you to review our entire financial situation** and see if we are missing anything else?"*

*I want to let you know what an outstanding experience I have taking **Erin Botsford's Elite Advisor Program** through the XYZ cohort. Prior to joining XYZ I was a private banker at U.S. Trust and managed a value fund so I have been in the industry for many years.*

*I can't tell you how valuable the program has been to me. **I consider it mandatory training for any financial advisor** and have strongly encouraged my partners at XYZ to take the course.*

I have already had some new big clients wins and the Elite Advisor program was a very helpful part of landing these substantial new clients. In one case, I never would have won the business if I hadn't taken the class.

98) Erin E.

*"I just used your '3 ways of being compensated' script...and **got a referral right then and there!** I love the language you used and I also just landed my largest client ever as a result and I've been in the business almost 2 decades."*

99) Bruce B.

*"I've been in many trainings in various firms throughout the country and **this is by the far the best training I've ever been in...period!** Great ideas, great structure, wordsmithing...it's been phenomenal and I appreciate being able to access to this program.*

I would tell anyone they should pay at least \$7500 for this training and even \$50,000 because it's worth it. Where else can you go to have your questions answered on a live call for over an hour like Erin does? This is so high-quality and you can use me as a reference anytime."

100) Jordan G

*"This program has been **monumentally helpful** for me as a newer advisor. It has completely changed my mind set and you can quote me on that."*

101) Maryann R.

*"You are both amazing and your program is **WORKING!!!** I just closed a **\$7,700 premium life** insurance policy for \$4M of coverage!!! I told Erin's story and it really had an impact. What a wonderful way to help clients understand how much I care..."*

Also, oh boy does the woman have not only 'veto power' but go-ahead power! Husband was still on the fence... I offered that we could launch the application process or proceed to the year end investment review... he said review but SHE said launch the process – which is what we did! With some new tools at XYZ the process was quick and I was still able to cover the investment review as well.

I am SO grateful to you both for all that you are doing to help advisors reach their full potential and most importantly help clients effectively! All the best!"

102) Sima A.

*“I want to thank you and share this with you...I had a prospect call me after two years of staying in touch with her. Although not a \$10 mill account, **but \$1mill**, I am still happy. I am working on getting my founders video with a video editor, so didn't have one today.*

I went into the meeting with the couple, I started with

- *Tell me why you are here.*
- *I told them why I became an Advisor, totally felt as Erin says, go naked! My voice was sounding nervous at first. The story broke the ice completely. They felt so at ease after hearing my story*
- *I asked them questions (approach talk)*
- *I hit a few of the disturbing issues (I admit, I got nervous and not really great at it, but first time using on real prospects)*
- *I then informed them of my **FP fee, \$1500** (I felt like gasping for air)*

They accepted to pay the FP fee and transferred the \$572k TSP to an IRA at XYZ. I feel like I actually, have a new system in place, a way to build my business the right way.

Thank you very much for all the coaching efforts.”

103) Apryl P.

*“Thank you for EVERYTHING! I'm setting up my practice the **“Erin way.”** This is the best business program I've ever been a part of!”*

104) Jane K.

*“I want to tell you how much I appreciate this **Elite Advisor program**. If you see my progress on the dashboard, it may appear that I'm not engaging as quickly or as much as others, but I want to tell you that is not a true reflection of my engagement or appreciation of the material!*

*I recently changed BD's in November last year, went independent with XYZ, and I'm still in the midst of transitioning my book. It has been unbelievably helpful to shift my mindset as now I'm truly a business owner, and I am hiring my first employee, first admin, starting in 2 weeks. The resources you've shared about organizing the business and building a team have **given me the courage to make this first hire**, albeit sooner than I previously expected. But I realize now how essential that is for me to maintain the growth momentum that I have currently.*

***I am deeply grateful and appreciative of you and this coaching program.** I have been an advisor for 12 years, in the industry since 2008, and I feel like I finally have the opportunity to build the business I've always imagined for myself—and it looks a whole lot like Erin's business! Thank you.”*

105) Carolyn H.

*"I have been with you since Oct 2020 and have had tremendous results from Erin's course. I used to work comfortably with prospects that had \$1-2M. Shortly after starting your course, I closed a \$15M business owner client using your concepts and it kept going from there. **I even closed a \$20M prospect** and we brought in another \$18M in assets in the last 6 months. I now have trained the next generation to take over and now take off every Friday. Erin's program gave me the potential that I never thought about before.*

*Oh and I failed to mention that **I have been named to the Forbes list of the Top Women Wealth Advisors** every year since benefitting from your course. This year, I was named the **#2 Best-In-State Woman Advisor in South Carolina**. Last year I was #35. Has your course changed my life? The numbers speak for themselves! Thank you!"*

106) Kimberly J.

*"I **grew 25%** last year in a year when the US markets dropped about - 20%. And in just the first 3 months of this year, I'm **up 30%**. I attribute this to Erin's system. Thank you!"*

107) Mary S.

*"With your help I went from basically zero to my first year **receiving \$53k in financial planning fees** and when my second year was the same, I realized I was doing something wrong. As you suggested, **I had to increase my fees and charge renewals!** In addition, I walk away from each call with a fresh nugget - like our last live coaching call. I am not going to fall into the trap of not asking for referrals, "I get paid in 3 ways", I need to practice your closing script. I have been saying I get paid in 2 ways but I have to overcome my own personal obstacles and just go for it.*

*You're a rock star and I am grateful for you sharing what you know! **Going to break \$100k in financial planning fees this year!**"*

108) Susan M.

*Thanks to you both for the help on my **exit strategy**. I did take Erin's advice not to sell to the advisor who wanted me to agree to a 2-year non-compete. And I was able to find a great local buyer for about 85% of my book with no non-compete. **I am so glad I asked Erin! Can't thank you enough.***

109) Rob C.

Hi Erin,

Just expressing my gratitude and letting you know how far we've come along since we were in your office back in 2013! I've spent the past 10 years implementing all of the

suggestions you gave me that day. In that time, we've gone from about **\$1.2M to \$4M** in annual revenue and the team keeps growing!

I was so inspired by the generosity of you and your team spending a whole day with me, that I wrote a book so that I could pay it forward and teach the Tara's of the world (another of your students) everything I've learned along the way. The book is called **The Financial Advisor Field Guide** and if you sent me your address, I will mail you a copy.

Thanks again for all that you've done for me and my team!

110) Akil D.

I have a praise; I did the approach talk twice last week and **landed both prospects**. They both didn't think twice, immediately said yes. I'm so excited! Thank you.

111) Jacob G.

First, thank you for the help and guidance you and Erin are providing. Truly appreciate it. After last week's discussion about fees, I asked my first prospect ever for a fee literally 20 mins after our call. I really did not expect him to say yes. I asked for a financial planning fee of \$2,500 as he did not meet my minimum. I quickly had to pivot because I was not prepared. **Wow, it works like you said and I'm only 6 weeks in!**

112) Jason M.

I just wanted to tell you about a win for the month. **I was invited to be on the news tomorrow to discuss retirement planning.**

Thank you again Erin and Mike for all your help. I have my team reading your suggested book, 10x is easier than 2x. We will discuss it during our weekly meeting

113) Ivan J.

Thanks, Mike. Will do! **I just started charging a fee this year and so far I have 3 plans.** Picking up a 4th on Friday!

114) Rich C.

Hey Erin,

Just wanted to let you know that today **I solicited my first financial planning fee (\$1,250) and the prospect agreed without really any hesitation.** I also just hired an Associate Advisor to my firm. The meeting today was the first one he sat in on. Thanks so much.

115) Cory P.

I just landed my biggest client after working with Erin over this past year. I just started charging fees last year and it was \$1200. By the way, my wife thought I would 'torpedo my business' when I added charging fees for plans. So I met with this prospect and they have a business valued at \$50M and generating a lot of cash flow.

I went through the whole Approach Talk and entire process as Erin teaches and all the while the mom was nodding her head in agreement. They were looking for a financial person to work with and when it came to quoting my fee for helping them, **I quoted a \$125,000 financial planning fee and they said YES!** Turns out their other professionals, CPA and the Estate Planning Attorney, have never covered these things like we do.

116) Christopher B.

Hi Erin and Mike
Hope all is well!

We've been seeing **huge traction in our practice**, and of course it's due to us following Erin's process.

Our fee revenue is increasing every month, and a few months after implementing, we decided to raise our fees. We were undercharging for the value we were delivering. We do not even bat an eye now when discussing fees. It's just a part of our story and process. Besides, most of our clients are getting most of their fees returned to them within weeks - reduced cost on home, auto, and liability that they haven't reviewed in years is often a very quick win.

I got the nicest compliment from an attorney we work with. I do a lot of planning for special needs families, and she loved the fact we were so open and transparent on how we are paid. There aren't many planners who do the work I do in our area, so she compared me to another advisor who pitches that his services are "free" upfront. She gets a lot of negative feedback on him since the families ask immediately "what's the catch?".....She said these families want and need the best and they are willing to pay for it and know NOTHING of quality is free.

If anyone needs further proof that listening to Erin on fees is critical to your business and your success - I have this story...When we first started our practice last year, my business partner had a potential client she was dealing with. We decided as a group to use him as a "test case" for Erin's process - so we decided to not charge him a fee. He dangled lots of opportunities - way underinsured, lots of assets to manage, etc. Could be huge! LOL Was it a big mistake? Well, I take the positives since it confirmed 100% we are doing what is right for our business.

After the 2nd meeting - we realized we would never want to work with him. We would literally flip a coin to see who had to do the next meeting in the process with them. LOL He's an engineer - I have lots of friends and family in that profession - great people but I don't enjoy working with them. Not a hard and fast rule, but they get extra scrutiny before we accept.

After going through the process - this person barely takes our advice. When he does, he does it by himself. He doesn't see the value of protection, doesn't see a need for life insurance, long term care, etc. Everything comes back to the rate of return and not wanting to pay people to do quality work. He NEVER would have worked with us if we had charged him a fee up front. Nice guy and family, but frankly he's a total DIY person, has an argument for everything, and is frankly cheap. We provided top shelf unpaid consulting - never ever again. Not an option. We could charge him \$25k a year and we wouldn't want to work with him.

Happy to share (and try to be brief LOL) - but thanks again for giving us the roadmap to success. **We will 10X this business in 3 years if not sooner.** Erin told me last year we need to be at cruising altitude by then -- that's our laser focused mission and trajectory.

Thanks!!
Chris

117) Michael B.

Erin,

I so appreciate you taking time to personally answer my questions. Thank you!

Your responses are affirming and challenging – thank you for helping me to improve.

And I know you probably hear this all the time, **but your program, content, delivery, and team are top notch. Worth every penny, and I'm sure much more.**

I look forward to continuing to learn from you.

118) Hardt B.

You guys are **ROCKSTARS** and I have benefitted greatly from the Elite Advisor program and the on-going community conversations since! Truly, **I think Erin is one of the most gifted and thought leading professionals in this line of work.**

I want to thank you for all that you have done to make me a better advisor – the questions I ask, how I charge, etc. I am grateful for your efforts and will forever be an

advocate on behalf of the three of you and the program itself. Along those lines, I am always happy to provide a reference.

Emily and I plan to continue to support Ebenezer and appreciate the commitment you and Bob have made to making a difference in so many young lives. Yet another example of how you inspire me and others in this community.

Please reach out if I can be helpful in any way. Again, I am a fan and would be honored by any chance to serve as an advocate.

119) Liz W.

I want to take a minute to say Thank You from the bottom of my heart for everything you're doing. I remember getting an email with a special offer to sign up. It's been one of the best things I've done.

I have benefited in so many ways, such as:

- I have a new mindset on how I approach my business and life
- I am learning to disturb (emphasis on learning!)
- I know my value and I don't do free work.
- I tell prospects that I work with women & couples with \$2M or more investable assets.
- I don't take clients who won't be a good fit.

I joined in early 2020. My average production in 2017-2019 was \$6.8M/year. **My production since has been \$15.5M, \$19.3M, \$30.9M, and so far \$28.1M** with money in the pipeline that should bring me over last year, but if it doesn't fall fast enough, will start next year strong. I have turned away people who wouldn't be a fit, because I know there are plenty of people who are a good fit and will be fun to work with for many years to come.

My biggest challenge is still that I'm doing too much. I thought I had hired a good administrative assistant but it didn't work out, so I'm back to looking. In the meantime, I've been setting aside the salary every week for the last 18 months, and thus I decided to use that money to pay for a Masters in Taxation. It more than covers the cost with money left as a cushion for my new hire.

I thank you for continuing to set an example of how to live a full life and move forward in the **continual pursuit of your 10x mission**.

I just closed a retiring physician with one meeting, about **\$3M** and paperwork is signed!

Thank you for everything,
Liz

120) Ivan J.

Hope all is well. Just wanted to let you and Erin know that **I closed an \$11,000 plan** last week...paid all up front.

When I purchased the Elite Advisor program, I committed to learning the language word for word and it's really paying off. **This is my first year charging a fee and I'm at \$20k in total planning fees YTD. I'm expecting to close the year at \$25k.**

Please tell Erin that I said, thanks!

121) Pamela C.

Hope this finds you and the team at The Elite Advisor coaching program in great spirits.

It's been about two months since I joined-- following one of Erin's impressive webinars, and I just had to reach out and share some of the successes that I've already experienced.

So day 1, I dove headfirst into the modules. **These have been transformative--** particularly in boosting my confidence in working with HNW prospects. The scripts, specifically Erin's statement on being the financial director of our client's lives along with the psychology in creating impact (I'm thinking of the 10x of the client's net worth here), and **the 3-step fee discussion have been pure gold-- or "money" as Erin rightly puts it.**

In these two months, my team has brought aboard three new financial planning clients right in my ideal target market. **\$10k in planning fees each for two of them and \$7500 for the other. One of them is in the process of selling a business interest worth \$15M, which my team will be managing.** I had another great meeting with a new prospect yesterday. I'm just getting started and excited to continue this growth trajectory.

A heartfelt thank you to you, Erin and the rest of the team for creating such a valuable resource for us in the industry.

122) Kelley S.

I couldn't make the January zoom but I thought I'd give you some updates on my progress using your program:

1. Implemented much better tracking of what my staff is doing and getting business completed and being accountable
2. Hired a licensed Office Supervisor – very excited to have him help build the team, make us better, bring in more AUM

3. Hired another Relationship Manager to assist her Strategic Planner. I already have another Strategic Planner/Relationship Manager (so I have two sets total)
4. Implemented a bonus structure for my staff so they are motivated to get business done and are rewarded when they achieve certain goals
5. I discuss my Enhanced Capabilities with my current clients. I tell them I will charge them \$2500 vs new clients I charge \$4500, so they get a discount. **I've had 80-90% sign up for the Private Client Process.**
6. For new prospects, I go over the Private Client Process and depending on what they tell me their net worth is, I come up with a yearly fee to quote them. I've done \$2500 **up to \$9500 so far.**
7. Your process has given me such peace of mind in having an actual process for my clients and for my staff. I haven't had anything like that before and I really, really, really want to thank you for that.
8. I am having my Strategic Planners meet with me and current clients. I'm then passing off to them any items that need to be completed. It's saving me a lot of time. How nice! I'm finding it's also helping them learn how to talk to a client, how to close, how to hold a clients hand that is having an issue with something.
9. I've joined a private golf country club and I'm regularly around multi-million-dollar people. I haven't gotten any business from it yet but over time I'm sure I will.
10. In addition to my radio show for leads, the country club membership as well as a new service that gives me 10 – 1 million dollar leads per month, I'm getting in

front of a lot of people and I'm really looking forward to collecting fees 😊

Thank you, Erin!!!

123) Cory P.

We held a planning presentation meeting for a client yesterday. 6.5MM in NW and we hold about 4MM in assets. Very politely the husband said he was eager to see what our **\$20k fee charged up front** would provide. He was tax sensitive (wife was not) and I shared many things but among them was destroying over 2MM in future income taxes as well as saving him 27k in taxes this year alone in one move.

He literally applauded after the meeting and said, "this is exactly what I was looking for and I'll run everything by you first about my business in the future."

They took all the recommendations. It was excellent. Thank you for everything you do!

124) Gary C.

I have to admit that during my transition & business transaction I wasn't fully invested in the process. But as a constant observer, **I was very impressed and saw how I could easily use the tools.**

125) Eric G.

We started with your program about 2 years ago. We really embraced your planning fees and so **we went from 0 to 6 figures in planning fees** by following your advice. On top of that, we were at our BD national conference and they told us that **we are the #1 office in the entire BD for generating planning fees!**

126) Tamala W.

Hello Erin & Mike,

Thank you for the guidance on structuring the book buy out from my partner. Your feedback made the conversation and negotiation uncomplicated. Thanks again!

127) Elizabeth M.

I was new in Erin's course and did the year-end planning that she teaches. I just hosted a women's seminar and my goal was to get 10 new prospects. The disturbing tracts taught in the course were a really good fit for my materials and I closed the seminar with them. I had 12 sign up and 9 show up and got 7 appointments and since then, I closed 3 of them already. I feel it was a great success and thanks to what I am learning in the course.

128) Jonathan J.

I have been in the course awhile but it's finally sinking in for me. I have a client where I manage his 401k and they were in for a meeting. In the past, they were so fee or cost conscious they never wanted to move their personal assets to me. I've been practicing Erin's Approach Talk and went through the disturbing tracts with them. Then I told them what you taught us, which is "I don't compete on cost." Looks like they'll be bringing over their \$2.8M in assets and the family NW is closer to \$6-8M.

129) Bruce H.

This was a business owner worth about \$30M that I did a small piece of business with years ago. I met with him and used all the things I learned in your Secret Sauce course. I found issues in his estate and so I quoted him a planning fee of \$28,500 to help him solve these issues for 3 months. I didn't want to lock myself in for a year. This was the highest fee I had ever quoted and I'm thinking of myself as a business owner just like Erin teaches. The client said it sounded reasonable and gave me the go ahead.

130) Omar M.

I started doing the things you said to do in the course and my business took off so tremendously. I've had times in my career where things worked and or whatever reason, I stopped doing them. So, I re-committed to finishing your course.

Seeing you Erin has been life-altering for me, my business and my family and I want to tell you I'm so grateful for all the information in the course and on the live call sessions. Last month **I expanded a relationship from \$3M to \$42M and a planning fee of \$85,000...which is the largest I've had in my career.** The reason they moved forward was the pain points questions from the course (disturbing tracts). Now, every client is paying us a separate fee. I would never have been able to do that without you.

131) Glen M.

I had a meeting this morning with a prospect and in the past, the wife in the relationship wasn't coming to our meetings. I know you said to have both there, but I went ahead and quoted a \$10,000 fee and he says that was right in line with what he thought. He's going to be selling his business in 3 years for about \$14 – 16M. So we are just starting with them and all because I used the Secret Sauce lessons from the program. Thanks.

132) Holly C.

First, I finished my Founder's Video that you teach, so that's done and client approved. I've been using your Approach Talk template; I love it and it has changed my world. I have **closed 7 financial plans so far this year.** I've made more in planning fees in the first quarter than I made all of last year!

I raised my minimum fee to \$7200 and I want to raise it again to \$10,000. Also I just **closed my biggest client ever, around \$30M...**all because of the confidence I've gained from your program. I feel like I'm on fire! Thank you.

133) Cory P

Great win today. We have two new advisors who recently came on board. One is new to the business and has been a student pastor for that last 13 years. He and his wife are close friends and this last year has been hellish to say the least for them. 3 years ago we were out to dinner and I told him I needed good people. He tucked that away in his pocket and engaged this last year. Brand new to the business and nervous about having a 1M minimum out the gate he took a chance. Yesterday he signed his first client for a fee of \$28,500. He broke down a bit in the office after the win. Tonight, I received a facetime after he and his wife went out for a celebratory dinner. It was one of the best calls I've gotten.

There is more to this story but I wanted to share it with you. All of your work has been a great blessing in my life and business and now I see it transferring to my team.