



Mark Little
Partial Client List

Guardian Investor Services
Thrivent Financial
AXA
Cascade Financial Management, Inc.
The Cambridge Legacy Group
B.R. Chamberlain & Associates, Inc.
Dunham & Associates
Texas Assoc. of Insurance &
Financial Advisors
First Command Financial Planning
Summit Wealth Management
Bachrach & Associates, Inc.

“Mark truly sets the bar high, both personally & professionally. He’s a huge source of inspiration for my practice and my life. I suspect that his processes make him the envy of many disorganized planners and his personal dedication to reaching his goals has motivated me to keep striving for mine!”

– Lou Leyes, Advisor, First Command Financial Planning

“Mark is a tremendous resource. He has helped me gain insights into what it takes to provide a high-value financial services practice. He communicates effectively and helps me recognize that I have what it takes to succeed.”

– Rick Raybin, Managing Director, Lifetime Capitol Group

“Mark Little is one of the most caring individuals I have ever met. He seems to have an unlimited willingness to help advisors become better with his personal brand of no-nonsense encouragement.”

– Jack Wenaus, Financial Advisor, Jack Wenaus Financial Services, Inc.

“Mark has enabled me to transform how my business operates. I now have a team who love managing themselves which has freed me to do the things that I am good at.”

– Mitch Harris, MLIA, (DIP), FPC, Managing Director, The Financial Services Group

“Mark Little’s practical knowledge and inspiring story have had a huge positive effect on my personal and professional life. I now work with higher quality clients and take much better care of my own health.”

– Karl Hicks, CFP®, MBA, Financial Advisor, The Leonard Financial Group, LLC

“Mark Little’s insight has been one of our most practical assets as we work toward the goal of building a top-notch practice. Mark has provided us an excellent model to emulate so we don’t have to reinvent the wheel.”

– Aaron Avery, Munn Wealth Management

“Mark has given me utterly priceless ideas that have helped me to become more productive, more efficient and more focused on my business and the way I carry it out.”

– Andy Jervis, ACII, MSFA, CFP®, Director, Chesterton House Financial Services Ltd.

“Mark’s ideas and examples of how he runs his business are excellent. He has been an inspiration to me on both a business and personal level.”

– Derek Brammel, Financial Advisor, The Bishoff Financial Group

“Mark knows what he is talking about. He has worked where we work and his system is easy to understand.”

– Beth Kelloff, Advisor, First Command Financial Planning