

Five Great Words Made Even Better In Action

By Bill Bachrach, CSP, CPAE

Commitment.
Consolidation.
Coordination.
Simplification.
Confidence.

Here's how you can put these powerful words into action to communicate with your clients and prospective clients the value of having a Trusted Advisor leading a team of Best-in-Class Subject-Matter-Experts for their benefit.

True **commitment** is the key to any successful program, process, and relationship. When you make a commitment to truly comprehensive financial services and commit to implementing the advice of your team of your Best-in-Class Subject-Matter-Experts led by your Trusted Advisor you will get your entire house in perfect financial order and keep it that way forever.

Regardless of their success or wealth, we estimate that less than 1% of people in the world actually have their entire financial house in perfect order. You can be one of them. This will not happen by accident. It happens by commitment.

Consolidation means that everything is organized together. You no longer have multiple relationships with different institutions that you have to manage and keep track of. Everything is in the hands of one team of experts, led by your Trusted Advisor, so all decisions are made with complete visibility to everything you have with your goals and values in mind.

Coordination means that there is synergy between all areas of your financial life and the expertise necessary to make smart choices about your money in alignment with your goals and values. Your Trusted Advisor is involved in every element of your financial life coordinating with you and the appropriate experts. Every member of your team: financial planner, tax experts, legal experts, insurance experts, money managers, etc. are always aware of your complete picture so you get the best advice possible.

Simplification. Your commitment to all of your financial affairs being consolidated and coordinated makes life for you and your family much simpler. Therefore, you can relax, enjoy your life, and do the things that are much more important in life than worrying about your money.

By making a commitment to consolidation, coordination, and simplification you also gain **confidence**. Confidence about your future. Confidence that your team of experts will make certain that nothing falls through the cracks, ever. Confidence that no matter what happens in the market, the economy, or the world that you have the highest probability of achieving your goals because your Trusted Advisor and your team of Best-in-Class Subject-Matter-Experts are giving you the best advice possible under all circumstances. You are confident that you will achieve your goals and fulfill your values.

Continue your journey of implementing the Values-Based Financial Planning® Turn-Key Business Model. If you do not already have the systems and processes to earn commitment from your prospects and clients to hire you to consolidate, coordinate, simplify, and be more confident

about their future, contact one of our coaches at 858-558-3200 or email SRMinterview@baivbfp.com for a complimentary consultation.

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