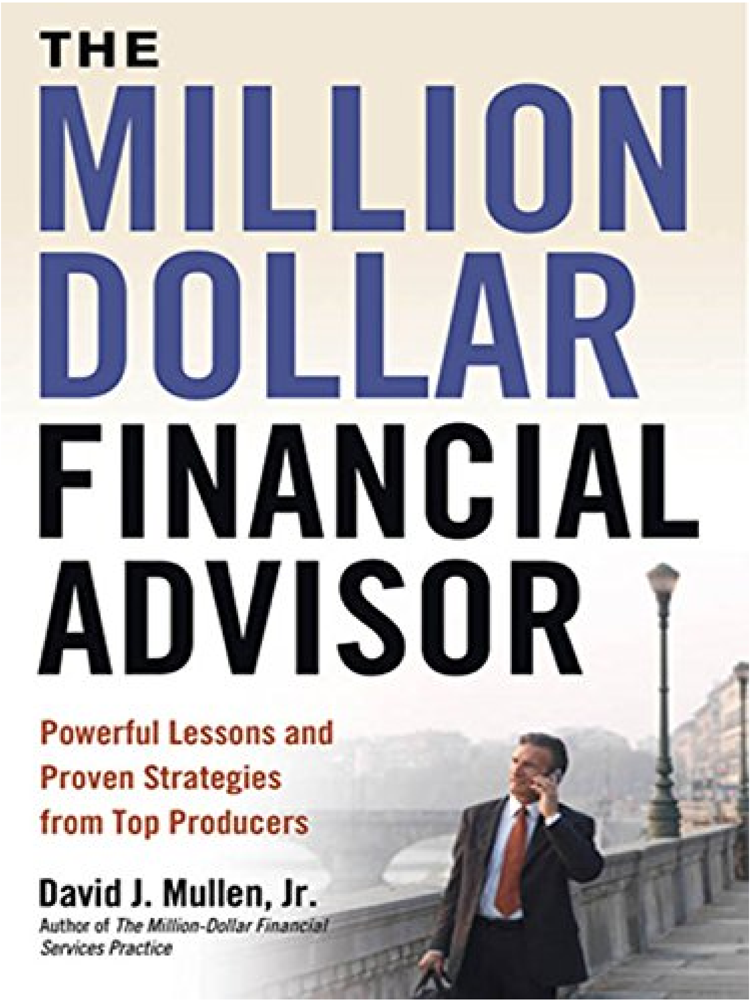
The Million-Dollar Financial Advisor: Powerful Lessons and Proven Strategies from Top Producers

David J. MULLEN



David J. MULLEN : The Million-Dollar Financial Advisor: Powerful Lessons and Proven Strategies from Top Producers before purchasing it in order to gage whether or not it would be worth my time, and all praised The Million-Dollar Financial Advisor: Powerful Lessons and Proven Strategies from Top Producers:

3 of 3 people found the following review helpful. Practical and Actionable Advice for the Advisor from Some of the BestBy Edward J. BartonThe follow on book to David Mullen's "Million Dollar Financial Services Practice". This book focuses on 15 separate advisors, and 13 lessons that can be learned from them. These 13 lessons are specific and actionable, and backstopped with stories and anecdotes from successful advisors with broad geographic and practice areas.The book is a good complement to the original, and there is a motivational component to the book that makes

you feel as a reader that the implementation of these strategies is both possible and practical - as well as the fact that these are multi-million dollar producers who actually did it, all over the country and in many different practice areas.The book is well written, easy to read, and has short checklists and summaries at the end of the lessons that will help focus the implementation of the practice development plan laid out in the two books. Definitely worth the read.3 of 3 people found the following review helpful. Highly recommended! Read below..By BFIf you are looking for ways to market yourself and manage clients this is a great book. This book is full of strategies used by successful wealth managers. You will find lots of information to help you develop or enhance your pitch book.This book less on strategies to build or manage wealth and more focused on how to land affluent prospects, manage your clients and get referrals.1 of 1 people found the following review helpful. Practice ChangingBy ddriesI am only on chapter six, but it has been very enlightening. The book has helped me become focused and revisit my business plan so I can start building the practice I have envisioned when I started rather than what it has become. I have built my confidence, raised the bar for the clients I am looking for, and implementing strategies to grow my business to what I dreamed of...This is a must read if you have not yet acheived the success for your practice which you desire. It gives real life guidance as to how you can grow your practice to what you want it to be, not generic information like most books.I see myself reading this multiple times....may update as I implement new strategied from the book.

The best financial advisors are well equipped to succeed regardless of market conditions. Based on interviews with fifteen top advisors, each doing several million dollars worth of business every year, The Million-Dollar Financial Advisor distills their universal success principles into thirteen distinct lessons. Each is explained step-by step for immediate application by veteran and new financial professionals alike. The lessons cover: bull; Building and focusing on client relationships bull; Having a top advisor mindset bull; Developing a long-term approach bull; Specialization bull; Marketing bull; And much more The book also features two complete case studies. First there is the ldquo;best of the bestrdquo; advisor whose incredible success showcases the power of all the booksrsquo;s principles working together in concert. The second is an account of a remarkable and inspiring career turn around and demonstrates that itrsquo;s never too late to reinvent oneself. Brimming with practical advice from the author and expert insights from his interview subjects, The Million-Dollar Financial Advisor is a priceless success tool for any and all financial advisors.

From the Inside Flap During David J. Mullen Jr.rsquo;s decades-long career successfully training top financial advisors, he was privileged to meet some of the very best and brightest in the financial services industry. While recruiting, hiring, and working with over 100 individuals who either were or, under his guidance, became ldquo;million plusrdquo; financial advisors, he was able to observe the best practices of these top financial advisors hellip;and now, in this book, he picks the brains of 15 of the very, very best, asking them how they got to be at the top of their game, how they stay therehellip;and how you can do the same. Organized into 13 distinct lessons derived from the principles each and every one of these highly successful advisors has followed to amazing results on their own personal and professional journeys, The Million-Dollar Financial Advisor illuminates the essence of these superstar advisorsrsquo; thoughts on topics crucial to your own advancement in the industry, including: Developing the Proper Mindset. Top advisors are confident and competitive, always providing an aura of being at the top of their game. This book shows you through specific examples how the best of the best remain focused and goal-oriented throughout their careers, always aspiring to do better, and consistently able to articulate their specific goals immediately and succinctly. Learn how to develop high energy, an incredible work ethic, and an overall vision that will see you through any challenges you may face. Professional Development. Whether itrsquo;s through professional designations, ongoing education, or searching for better and more efficient business practices, you need to devote the proper time and resources to set yourself apart from the competition. This book provides you with field-tested techniques for doing so, as well as methods for ensuring that you never quit learning. Determining Your Area of Specialization. Typically, financial advisors start out as generalists, casting a wide net to find whatever clients they can find. But over time, you must winnow your sights down to a particular niche. Find out how to identify your own area of expertisehellip;and then corner the market. Become a Wealth Manager. Cream-of-the-crop advisors take a comprehensive, holistic approach to investment management, taking care of all of their clientsrsquo; financial needs, from portfolio management to liability management, asset protection, banking, retirement, and estate planning. This book reveals long-term, practical techniques for earning trust and expanding your advisory roles for your best clients. Marketing. If you want to push yourself into the million-dollar bracket, yoursquo;ll have to learn how to activelymdash;and successfullymdash;market yourself over the course of your entire career. Discover the practices top practitioners use involving client referrals, professional referral networks, client events, nonprofit leadership, niche marketing, and more. Focus on Relationship. Become a master relationship builder, communicating, socializing, and gaining access to affluent clients and prospects by developing excellent one-on-one people skills. Discover how to become an active listener, constantly and immediately attuned to the needs of affluent investors. The lessons presented in this uniquely revealing book have withstood the test of time no matter what the state of the economy, because the principles of good business always stay the same. The Million-Dollar Financial Advisor provides you a rare glimpse into the minds of the industryrsquo;s top professionals, showing you a clear way to the top of your own greatest ambitions. DAVID J. MULLEN JR. is the author of The Million-Dollar Financial Services Practice as well as a 30-year industry veteran and former Managing Director at Merrill Lynch, where he trained more than 500 financial advisors. The success rate of his advisor training programs has been significantly higher than the industry average. Dave can be reached through his website, www.learntactix.com. He lives in Englewood, Colorado. From the Back Cover If you could corner the worldrsquo;s top financial advisors and convince them to divulge the secrets of their success, itrsquo;s fairly obvious what questions you would ask them. You would want to find out what qualities they feel have led to their place among the best, how they set themselves apart from other advisors, what methods they used to get their firstmdash;and then, biggestmdash;clients, and whether they had a vision starting out and how their professional game plan may have evolved since then. You would ask them how they structure their time, focus their marketing efforts, and determine their own niche. And then you would try to figure out what these top-of-the-game advisors all had in common. Based on interviews with 15 mega-successful advisors, each doing millions of dollars worth of business every year, The Million-Dollar Financial Advisor distills their universal success principles into 13 distinct lessons, covering topics essential to your own success, such as how to build and focus on client relationships, have a top advisor mindset, develop a long-term approach, and much more. In some cases, these principles may confirm what you are currently doing right; in others, they will identify a gap in your business practice that needs to be developed for you to attain the level of success you know you deserve. The book lays out specific actions you can take in order to put these lessons into practice for your own business mdash; and features two complete case studies: one of a ldquo;best of the bestrdquo; advisor whose incredible career trajectory showcases the power of all the bookrsquo;s principles working together; the other of a remarkable and inspiring career turnaround demonstrating that itrsquo;s never too late to reinvent yourself. Brimming with practical advice from author David J. Mullen Jr. and expert insights from his interview subjects, The Million-Dollar Financial Advisor is a priceless success tool for any and all financial advisors. Praise for David J. Mullen Jr.rsquo;s The Million-Dollar Financial Services Practice: ldquo;hellip;information on marketing, prospecting, sales, and time management techniques is presented clearly and in great detail. The book is one advisors will refer to often.rdquo; mdash; Research Magazine ldquo;hellip;filled with valuable information from a smart manager who has been there and done that successfully.rdquo;` mdash; On Wall Street ldquo;hellip;a helpful resource for financial professionals who have the motivation and desire to build and maintain a solid business model.rdquo; mdash; Agentrsquo;s Sales Journal ldquo;hellip;providing clearhellip;processes for defining and implementing proven marketing tactics for financial practices to use as a guidelinehellip; give[s] new and existing owners some food for thought.rdquo; mdash; Broker Dealer Journal About the Author DAVID J. MULLEN JR. (Englewood, CO) is the author of The Million-Dollar Financial Services Practice as well as a 30-year industry veteran and former Managing Director at Merrill Lynch, where he trained more than 500 financial advisors. The success rate of his advisor training programs have been significantly higher than the industry average.