# McHenry - More Clients Program - Prep Work

## Ideal Clients

*Demographically….*

**Location** - here in WA State and in Texas. WA State - Leavenworth, Wenatchee, Chelan areas. Also Seattle folks who may have a second home in this area. Texas - Houston area.

**Age =** Younger Generation - Gen Y. My Generation - Gen X. And the Baby Boomer Generation.

**Families** - with younger kids including newborns.

*Psychographically….*

**Delegators** - those who want to delegate/outsource their personal financial management.
**Validators** - those who want to collaborate with me in managing their finances.

**Fun/Enjoyable** types - we get along and enjoy each other's company.

**Similar Passions/Hobbies** - we enjoy many of the same things - outdoors stuff, music, etc.

**Other Specific Preferences** - see this page on my website (**Is This You** page):

- Want to work with a real human being.
- Want to work with the same human being.
- They occasionally want to meet in person as opposed to 100% virtual.

## Ultimate Outcome/Core Client Question

My ultimate outcome is helping people maximize their Return On Life (ROL) with the money and resources they have. Most financial professionals only focus on helping people achieve the best Return on Investment (ROI) that they can get from their money and investment portfolios. Our focus goes much deeper than this! Money is only a resource and at times can actually be a detriment. Those with the most money don't always win in the game of life! Instead of focusing on ROI, we focus on ROL. We help people use their money in ways to help them maximize and achieve the most out of their life.

Core issue/challenge….How do we take care of all the financial issues and things we need to do in ways to help us maximize or get the most out of our life?

## Success Story

I have several of these - many are from the last Great Recession - not unlike where we are today. They were afraid of the financial system collapsing and wanted to sell out but through my encouragement/coaching/support they stayed in and were able to grow their wealth the last ten years through one of the longest bull markets we've ever had.

As I pivot to working with younger people - the success story shifts to helping these people get all their ducks in a row - an estate plan (will, guardian, trust as needed), insurance - right kinds and amounts, investment plan, savings/budget plan, and retirement plan. Essentially getting them prepared and in much better financial shape than where they were before they started working with me. And then as their life changes, we make changes and modify/adapt accordingly to meet these new changes.

### Values

Core values in my business are TO BE the following:

- Professional - acting this way at all times.
- Authentic - being real and being myself.
- Caring - placing the client's interest first ahead of my own (Fiduciary).
- Personable - being very relatable to my clients in getting to know them.

### Business Vision

NOTE: See my **Vision Traction Organizer (VTO)** - will send this document to you.

I learned that the best, most successful businesses are all built on relationships. Really putting the client first and doing what is right for them (versus you) at all times. Treating every client with respect.

I learned that a concierge approach is not common anymore these days in most service businesses! Most don't take the time to really get to know their customer and hence don't create that awesome client experience for people. By making this a real focus, I have been able to build an awesome business serving great people who naturally want to refer other great people to me which is what has happened and I've grown tremendously by word of mouth alone.

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The one major breakthrough and insight was going to the Naturopathic doctors in Peshastin - what an awesome experience that I've been able to re-create for my business. I am the only Certified Financial Planner in town who really focuses on ROL. This is such a different experience than anyone else in this area. I was able to market this difference effectively in my community and the nearby communities which initially attracted me many of my early on good new clients here in Washington. From there word of mouth and referrals really took over and supplied me a very steady stream of great new prospects with more business than I could handle. I eventually hired a younger version of myself to work with me and they have become my apprentice and will eventually take over one day.

My personal life is great right now! My wife and I have a healthy family who are doing really well in the community. We love where we live and we do so many things outdoors and are very involved in the community. Life is really sweet right now!

## HEOB

This is my Foundation Program - see page on my website for this (Program page).

1. The Foundation Program
    a. Ultimate Outcome = maximize your Return on Life (ROL).
    b. Cost = see Fees page on my website.
    c. How Different? Focused on Return on Life (ROL).
    d. Increase Income = see my ROCKS sheet. Goal is 10-12 new clients/year.
2. Structure - see Program page and the Five Steps.
3. Ideal Clients - where do they come from? My own community and nearby communities through my networking efforts and a few key relationships with Centers of Influence (COI) who have referred me.
4. Difference it would make to my business? It would make all the difference and allow me to build a very profitable and financially rewarding Lifestyle practice that I thoroughly enjoy while making a real difference in my clients' lives!

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## Strengths/Weaknesses

Strengths:
- Authentic
- Passionate
- Naturally good listener
- Good Starter
- Introvert

Weaknesses:
- Perfectionist
- Introvert
- Not a good Finisher

## Committment

Robert - you know me and that I am committed. I really want to go for it and NOT be scared to try many things as I am now essentially starting over in a brand new community! It feels way more natural this time around and I believe my ROL approach is very different and fits in perfectly with those who really want to have a real relationship with someone!

This biggest challenge and headwind right now as you know is COVID-19! I do NOT want to build a virtual business but rather a more traditional in person business because I believe there are many people out there seeking this - if they want virtual - they have many ROBO choices and options these days. I can't compete with those and I don't want to compete in that arena.

So how do I do this in the face of this new virus? Hopefully our world gets through this and we actually have a boomerang effect of those seeking real in person interaction as opposed to being stuck in their home and behind a computer using Zoom all day!

I do want to use virtual to enhance my services but not go 100% virtual. This to me is the real difference right now and will be for a long time. I want those seeking a real connection who will pay a premium for a much better client experience. This experience can't be replicated exclusively using Zoom. There is something about that in person connection that can't be replaced and certain people know this and these are the people I need to market to!

I see myself now playing the role of a Financial Coach and Therapist - this is where the real value add is especially in times like these!