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PRESENTS



STEPHEN OLIVER, MBA, Ph.D. GREG MOODY, Ph.D

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STEPHEN OLIVER ([00:00](#)):

So our topic today is, if you're looking at an existing practice, and let's say that you're fairly established, where do you start first? Where is the low-hanging fruit? And as we work with clients, I think they all think that we're going to go create some new, big marketing deal, and we're going to go build a social media thing, build an online presence, do all this other stuff. And we do all that. It's just that I always think about... And it's again, this was a great quote. One of our former clients, our current client was talking to him and said, "Well, what do these guys do?" And he goes, "Well, he found money laying around my business that I didn't know was there." I thought it was a great line. In fact, I had another story like that, where a prospective client talked to another current client.

STEPHEN OLIVER ([00:51](#)):

And he said, "Wow, they sure turn shacks into mansions." That was a great line too. I hadn't heard that one before. But most people have more money laying around, metaphorically on the floor, than they're picking up, and the money tends to be in lists. Right? It tends to be in, who do I have that's in the CRM, on an Excel's file, or on pieces of paper that raised their hand that I didn't end up with as a client? Who is it that I maybe used to have as a client, who's not currently a client? What do I have buried in my client list who perhaps could buy more, perhaps I'm not managing their assets? I just sold them an annuity or an insurance policy, or I could generate referrals from. And we tend to start with what are your current resources? And there's more to it than that up, but let's talk about that.

Greg Moody ([01:43](#)):

Yeah. I think that one of the things that we want to make sure we do when we take on a new client is, get them to a place where they can get results quickly.

STEPHEN OLIVER ([01:52](#)):

Yeah.

Greg Moody ([01:56](#)):

We want to build out a really robust system for them to get more clients on a regular basis and make sure they get the most efficiency with each client, so they make the most per client, they get the most assets under management per client, and they keep them the longest. So we want to do all of that. But one of the first lines of attack should be where is the quickest way that they can get new clients? And what they think is, is I got to go out there and get more clients. I got to go outside of my own business and get clients.

Greg Moody ([02:28](#)):

And what you're saying is, and what's really important is, it's already there. It's already there in past clients. So we want to make sure that you understand these basic concepts so that you can do a good job of marketing. And what we kind of hear all the time is, "Well, I did this marketing and I got a bunch of prospects and leads. I called them a couple times and I got a few clients from it and that was the end of it." Well, okay. You called them a couple times and you assume from calling them a couple times and because they didn't answer the phone, that therefore they're never going to be interested in working with you. Well, there's lots and lots and lots of reasons why they didn't answer the phone.

Greg Moody ([03:14](#)):

They were busy. You just didn't call them at the right time. It wasn't the right time for them in their life. There's all kinds of different reasons why that wasn't the right time for them to work with you. Or they just didn't answer the phone because they were busy, or whatever. And we got to understand that those people are worth... They're gold mining and we've got to get back to them right away. So when we start working with a client, that's a big line of attack. So we want to go over what the idea behind the different levels of prospects and clients that you might have out there are.

STEPHEN OLIVER ([03:53](#)):

Yeah. On the line of topic that you were just talking about, is, I told you about the conversation I had, and it's a very sharp gentleman, high producer coming from being captive in a big life insurance company, into being an independent RIA. And he was just learning direct response marketing, and had studied a lot of fairly smart people. But he says to me, I said, "So you have a new prospect. What do you do with them?" And he said, "Well, I learned about email and email's great, and I want it to be very personal and relatable. So I created 29 emails and they get an email every day." I said, "Well, great, great." And then he goes, "It's very conversational. It's very personal. It looks personal." And I was like, "Great."

Greg Moody ([04:45](#)):

Good so far.

STEPHEN OLIVER ([04:46](#)):

Yeah, good so far. And I said, "What happens after 29 days?" He goes, "Oh, I wipe them off the list, because obviously they're not interested."

Greg Moody ([04:54](#)):

Yeah.

STEPHEN OLIVER ([04:58](#)):

If they don't buy in September, they might be really interested in December, they might be interested in January, they might be interested in March. Hell, we a client meeting in, what, one of them said, "Yeah, yeah, yeah. You were sending me things for seven years." Another one said, "Yeah, for four years." Another one said nine years. Right?

Greg Moody ([05:19](#)):

Yeah.

STEPHEN OLIVER ([05:19](#)):

Which was kind of discouraging, but it is what it is. The number one thing is, as you said, is most of the time you haven't gotten to them very effectively, and two is, just because they're not ready now doesn't mean they're not ready in three months, six months, nine months, nine years, for God's sake. But then the second part of the conversation was, okay, so they get an auto responder email and constant contact or MailChimp or whatever the hell, some CRM. What else are you doing? And he looked at me like I was from planet Mars. And he said, "Well, what do you mean?" I said, "Well, are they getting sequential autoresponder direct mail? Are they getting a package in the mail?"

Greg Moody ([06:03](#)):

And the direct mail one is interesting, because we get a lot of people just kind of freaking out at that going, "Oh, what do you mean snail mail?" Like it's a bad name or it's a bad word. And it's ludicrous because that works just fantastic. But people are not taking advantage of that at all.

STEPHEN OLIVER ([06:20](#)):

Yeah.

Greg Moody ([06:20](#)):

But anyway.

STEPHEN OLIVER ([06:21](#)):

Well, you know how I feel about email, but-

Greg Moody ([06:23](#)):

Yeah.

STEPHEN OLIVER ([06:23](#)):

So I said, "Are you doing any direct mail? Are you mailing them your book? Are you mailing him a postcard? Do you have a sequence?" He goes, "Oh no, I don't do any direct mail." Same reaction that you got. I said, "Well, okay. As an aside, what's a new client worth?" "Oh, well they're usually going to spend \$50,000 with me over their term of being around." Okay. "Well, that's quite a bit, but how about immediately, what are they worth?" "Well, they're worth five, six, \$7,000." Okay. "So, you don't want to put a first class stamp on a postcard and mail it to them even though they're worth \$50,000?" "Well, that's expensive." What? Right? And of course, we can build out a postcard sequence, that's like a bucket drop.

STEPHEN OLIVER ([07:15](#)):

So, you spend 12 bucks, hit them 12 times. You can mail them a book for four or five bucks. Right? I mean, hell the books, two bucks or three bucks. And then I said, "So are you doing outbound calls to them?" "Well, no." "Are you doing automated voicemail to them?" "No." "Are you doing text messaging to them?" "No." Well, email's fine. To me it's dying a slow and painful death, and it may not be that slow, but you have deliverability problems, you have the average person gets 200 emails a day. The average person gets four pieces of mail in their mailbox per day. And text messaging still has essentially 100% deliverability rate and essentially 100% open rate. It's like 98 to 94%. Now that'll go away as the marketers start dominating it, but why wouldn't you... If you got a lead, why wouldn't you email, text, voicemail, call and direct mail.

STEPHEN OLIVER ([08:18](#)):

And by the way, the next question was, "Well, are you doing any retargeting?" "What's retargeting?" Well, you know how you go to... I was shopping for Lynn's camera here. I was shopping for video camera a couple years ago and I went to BNH Video and I went to Amazon and I went to somebody else, New York something or other, and looked at video cameras. Well, I got to tell you, for the next three or four months everywhere I looked, I was getting high end, \$5,000 video cameras showing up in ads all over

the damn place. Well, I went to three different places who were smart. Right? Because Amazon does the hell out of this, but also BNH... Right?

Greg Moody ([09:02](#)):

Yeah, BNH Video. Yeah.

STEPHEN OLIVER ([09:04](#)):

They're smart at this, and New York whatever they're... They're smart at it. But retargeting doesn't have to be... They went to the website. What people don't know is, is it can be, you have the little HTML code and you start showing up in Google and start showing up in Facebook-

Greg Moody ([09:20](#)):

Well, it's when you start seeing everybody's ad... Something you search for, and then you start seeing it up in lots of other places like in your Facebook, when you look at Facebook, when you look at a newsfeed, when you look even on my iPad, I see a popup when I'm looking at a newspaper feed.

STEPHEN OLIVER ([09:36](#)):

Yeah. But it can also be, I have their email address, their name, their address, and I upload it into Google and I upload it into Facebook and say, "Show these names." Right?

Greg Moody ([09:45](#)):

Yeah. And then start showing up everywhere.

STEPHEN OLIVER ([09:46](#)):

Yeah. So in that example, if there's a new prospect that raised their hand anywhere... I went to a live event and they gave me their business card, whatever, I can show up in Facebook and all of their properties, Instagram and so forth, I can show up in Googling all their properties, which is like the rest of the internet pretty much. Right? And then I can email to them, might as well, it's free, but I can text message. I can voicemail them, I can have a live person calling them, and I can do direct mail. And the next question I asked him is, "Well, what are you doing to get your contact information in their phone?" He goes, "What do you mean?"

Greg Moody ([10:21](#)):

Lots of, "What do you means?"

STEPHEN OLIVER ([10:22](#)):

I said, "Well, if you pick up the phone and call them... Like we used to do big [inaudible 00:10:28]. I remember one, we had so many leads that we were in black trash bags. I mean, this is... Of course, that's back when I had big staff. Right? So we had 20 people, probably more like 30 people on Sunday night doing outbound calls.

Greg Moody ([10:40](#)):

Yeah. I know the days where we'd have... The purpose was to get a name, phone, and later email, when email became a thing... We've been doing this long enough that email wasn't a thing back then, but it used to be you'd get your-

STEPHEN OLIVER ([10:50](#)):

Pre-email.

Greg Moody ([10:52](#)):

Yeah. It used to be, you'd just get their name and phone number, then you'd call them. And that's when people answered their phone, now they'd don't.

STEPHEN OLIVER ([10:57](#)):

Yeah.

Greg Moody ([10:58](#)):

Different strategy now. But when you call them, they follow up with what... I think I know where you were going with this, but following up with what you're saying now, when you call them, a lot of times they don't answer the phone. One of the strategies that we want to make sure we do is when we're having-

STEPHEN OLIVER ([11:15](#)):

Well, I could exaggerate and say they never their phone if they don't recognize the phone number.

Greg Moody ([11:20](#)):

Yeah. Pretty much that's a thing. If you call them and they don't recognize your phone number, a lot of times people don't answer it. But what you can do is send out by email, by text, by multiple methods, or when you're face-to-face with them, and say, if it's a live event where you capture their information, send them your contact record. It's technically called a V card, but it's just from your regular... From your iPhone.

STEPHEN OLIVER ([11:47](#)):

You know what's new? Is one of our guys has a wristband and a tablet and a business card and you tap it and Near-Field communication shares it.

Greg Moody ([11:58](#)):

Yeah. There's a credit card version of it too. So there's multiple ways you can share this, but it's just from your contact record on your phone, just your regular contact record, and you can share it from your phone from multiple sources. So you can share your contact record with somebody and they can add it to their phone list. When you do that, then when you call them, it's going to show as an actual person. It's going to show your business name or you, and even though it's you as a business, they're 10 to a hundred times more likely to answer the phone because you're in their contact list. So, that's a critical thing to do. So outbound calling then will work much better and they'll be much more likely to answer the phone and/or listen to your voicemail if you left them a voicemail.

STEPHEN OLIVER ([12:46](#)):

Yeah. And we're getting stuck in the weeds a little bit, but to step back with the strategies. When you're looking at your business, you start with what are my current opportunities? And so you and I always ask, "What makes you special? What's unique about you?" And they'll be, "Well, what do you mean?" "Well, I mean, are you in the Qantas club, are you in your alumni association? Did you have a career before you

did this? What was..." And lot of times people are like, "Oh yeah, I used to do blank, which is a perfect niche where they all need a financial planner."

Greg Moody ([13:20](#)):

Somebody we talked to the other day was the mayor of a town, so he had a relationship with other mayors and other politicians.

STEPHEN OLIVER ([13:26](#)):

Well, and we have a client who practicing CPA still, and one who was a general contractor, and you can go through the list. In fact, another one who was in SAG and a working actress and a working model. Well, all of those things are, "Well, oh my goodness. You have affinity with that group. Do you have a list of them? Are you in their association? Do you go to meetings? Do you get a magazine? Are you on their newsletter? What is it?" And so, that's where we tend to start is... Another client is into Porsches. So he's got a 30 year relationship with a Porsche dealer and he spent 2.3 million dollars with him or something like that over the years. And so, "Well, okay, what about their client base?"

STEPHEN OLIVER ([14:12](#)):

I mean, that's a fairly affluent client base. Why don't we market to their client base. All the way down to, we have a live meeting in the dealership, because they have plenty of room, and can have the meeting at the dealership, and of course, that way his clients can see the cars and be enticed and their clients can come down and learn about how to have enough money to both retire without being in poverty and buy toys. Right? But you start with what are my current resources? And it's what do I do? What's my background? What affiliations do I have? What organizations am I involved with? What are my hobbies and other-

Greg Moody ([14:50](#)):

I mean, I got to say, if I have a relationship with a Porsche dealer, I spent two million with them and I'm in the Porsche club, that is money lying on the floor.

STEPHEN OLIVER ([14:58](#)):

Oh yeah, yeah, yeah.

Greg Moody ([14:59](#)):

That's money lying on the floor.

STEPHEN OLIVER ([15:00](#)):

And you haven't even thought to pick up any of it.

Greg Moody ([15:02](#)):

Yeah, yeah. That's a good example of what you can do immediately. And within 30 days you're going to have something going that both... Everybody benefits. That's like the art gallery example, which is the same guy, by the way.

STEPHEN OLIVER ([15:14](#)):

Yeah. Yeah. Yeah. Well, I immediately took a picture of him with his car and I said, "Okay, so they have a local newsletter, they have a regional newsletter. They have PCA events, Porsche club events." Of course, I have the same affliction, so I knew all of this.

Greg Moody ([15:28](#)):

Sure.

STEPHEN OLIVER ([15:30](#)):

But they have the track events, they have other events, they have a national magazine. We can do all of it. Right? And if you have a relationship with a dealer, they can communicate to their clientele, and I bet they have a big database of-

Greg Moody ([15:46](#)):

Plus how likely is it that you're going to like those people you're dealing with?

STEPHEN OLIVER ([15:50](#)):

Yeah.

Greg Moody ([15:51](#)):

And they're going to like you, and it's going to be easier to close more business and do more business with them. I mean-

STEPHEN OLIVER ([15:58](#)):

Here's how far I went with that one. Okay, let's get the office, and we're going to have the garage over there, and you're going to set it up really nicely, and you're going to have your collection of vintage Porsches over there. There's going to be a glass wall and the conference room is here and the whole thing has the German Porsche theme. And so your office is here, the conference room here, and there's a glass wall, and the cars. I thought it was a great idea.

Greg Moody ([16:23](#)):

Yeah.

STEPHEN OLIVER ([16:23](#)):

Yeah.

Greg Moody ([16:24](#)):

That's perfect.

STEPHEN OLIVER ([16:25](#)):

Yeah.

Greg Moody ([16:25](#)):

But yeah, but those are the things that you can do that again, can you imagine that, that's literally money line on the floor that you just got to pick up. And again, it's fun. I mean, it would be right along with what you like doing.

STEPHEN OLIVER ([16:39](#)):

Yeah. Well, and again, it's not the... I'm no worst in anybody else syndrome. It's what makes you... Remember we have another client who's... We were going through the same set of questions. Right? What do you do? What makes you unique? One thing or another? He goes, "What, that I'll admit to?" I said, "Well, don't tell me any sexual perversions or anything."

Greg Moody ([16:57](#)):

Right, right, right. Yeah, don't do those.

STEPHEN OLIVER ([16:59](#)):

But he's into Star Wars, and I mean, he's a Star Wars geek. Right? So he goes to-

Greg Moody ([17:03](#)):

That's perfect.

STEPHEN OLIVER ([17:03](#)):

He goes to the conventions and he's got a room in his house with every Lego Star Wars thing on shelves and so forth. Well, it's not me. Of course, I'm a Trek guy. Right? But, there's a whole bunch of people who are into that, and there's a bunch of other people like me. I mean, I'm in his target audience. I think it's cool.

Greg Moody ([17:26](#)):

Yeah.

STEPHEN OLIVER ([17:27](#)):

Right? I mean, I think it's super cool. So why he doesn't he use the photos of him geeked out, him and his wife. He has all these pictures that he's dressed up like... Well, not the Wookiee. I was telling him, I wanted him dressed up like the Wookiee, but he's dressed up like Han and different guys, and he's going to Comic Con.

Greg Moody ([17:43](#)):

I think you need a background of him and the Millennium Falcon.

STEPHEN OLIVER ([17:46](#)):

Yeah, yeah, yeah.

Greg Moody ([17:46](#)):

Yeah. Right.

STEPHEN OLIVER ([17:46](#)):

Yeah. Yeah. But why not go full hog on that?

Greg Moody ([17:50](#)):

Right.

STEPHEN OLIVER ([17:51](#)):

And most people, you and I start calling it the Oak desk with a JC Penny suit.

Greg Moody ([17:57](#)):

Right, right.

STEPHEN OLIVER ([17:58](#)):

I mean, it seems like every financial advisor is the same picture.

Greg Moody ([18:01](#)):

If you look like everybody else, you're just going to be everybody else.

STEPHEN OLIVER ([18:04](#)):

Yeah.

Greg Moody ([18:05](#)):

And then you're marketing by zip code.

STEPHEN OLIVER ([18:06](#)):

Exactly.

Greg Moody ([18:06](#)):

Or you're getting prospects by zip code and that's just-

STEPHEN OLIVER ([18:09](#)):

That's just stupid.

Greg Moody ([18:10](#)):

It's never going to be a big growth strategy.

STEPHEN OLIVER ([18:14](#)):

Yeah, yeah. Well, nor loyalty, nor referrals, nor anything else. Right? I mean, I don't want to go to a luncheon with my friends and say, "I got this new financial advisor. Oh my good, he's got a CACP, [inaudible 00:18:29], and CFP, and a C da, da, da." Well, they don't know or give a shit about any of that stuff. Right? But if I say, "Oh yeah, yeah. I worked with my advisor today and he's such a Star Wars geek. And by the way, he's really sharp at this stuff. He wrote the book on it, but he's so cool. You'd love to meet him." Right? "I went to my advisor today and he just came from the day at the track and they were doing this stuff and he had driven up his new turbo." I mean, whatever it is, you got to be interesting. There's got to be-

Greg Moody ([19:02](#)):

Yeah, and you bring up a good point. We want you to be interesting and we want you to build authority. The way you build authority, you have to have, just like we talked about in other segments, your qualifications are very important and you have to have those, just like if you were a medical doctor. You'd have to be an MD, if you were an orthopedic surgeon, you'd have to have those qualifications, but you need to be interesting for a certain reason like we're talking about. But you build authority possibly because you wrote a book and we help... You can go have the book ghost written, but you could write a book, you have white papers, you have other pieces that you've done.

STEPHEN OLIVER ([19:40](#)):

You were on TV, you were in the paper.

Greg Moody ([19:40](#)):

You were on TV.

STEPHEN OLIVER ([19:41](#)):

Or you have magazine covers. Yeah.

Greg Moody ([19:44](#)):

And those don't have to be, you don't have to be the most extroverted guy. You don't have to be the best writer, but you need to build authority for those reasons that are also a unique thing. So this uniqueness is personality that doesn't have to be... You don't have to be Tony Robbins. You don't have to be outgoing. You don't have to be a performer, but you can build this personality thing based on who you are. And, maybe some who you might think, "Well, I don't have much personality." Okay, we can help you with that. But then also build authority around who you are as well. It's not because you have more letters after your name, as much as... I mean, I have a PhD. You don't hear me... I mean, I only say that, because that doesn't really... It doesn't really do anything except in maybe in a particular [crosstalk 00:20:30] niche. He has an MBA.

STEPHEN OLIVER ([20:32](#)):

I tell everybody MBA stands for more bad answers and PhD is pile hirer and deeper.

Greg Moody ([20:36](#)):

Exactly. Yeah. I mean, it doesn't change anything. The authority's built in certain things you've done or in some uniqueness in other areas and that's really important. And frankly, if we were talking to doctors, it'd be the same thing.

STEPHEN OLIVER ([20:52](#)):

Oh yeah.

Greg Moody ([20:53](#)):

People usually pick doctors by zip code, for goodness sake, and which insurance is covered. Which one is covered by your insurance. That's kind of a lousy way, if I was a doctor, to get business.

STEPHEN OLIVER ([21:03](#)):

Well, back when we were in franchising with both feet and up hip deep, we had the most expensive franchising lawyer in, I don't know, a 10 state area with Perkins Coie, but they were into mountain biking and hiking. And there was this uniqueness to who they were, right? And even their office. I mean, you walked in their office, it was kind of laid back, and it was fun. Most of the time you were there, there was a birthday cake for one of the associates and stuff. And it wasn't like white shoe, boring Oak panels, and nobody has any personality. My other friend, Lorenzo, he's a very highly paid attorney, but he also is into mariachi. He's a musician. So he is put out CDs and he travels around playing with a mariachi band, but it's cool. Right?

Greg Moody ([21:55](#)):

Yeah.

STEPHEN OLIVER ([21:55](#)):

And so, he's got some of the highest end clients, but they have affinity with him, not because you and I into mariachi, but it's just a cool thing. Right? It is something unique about their personality that makes them stand out. And like you said, "On the other side, we build authority." I was talking to somebody who's doing a pretty good job of getting, online anyway, publicity. Right? But the problem is they're not turning that into anything else because they're not getting direct clients. But if you're the one that's been on 28 TV shows and you have 22 magazine articles and they get the packet... Like Jhoon Rhee, my martial arts instructor. He had a magazine that was all the magazine articles he had ever had. Right? So he's got this big thing and he's got a reel of all the TV interviews he'd ever had, and everybody who came within five feet of him had to see them all. Right?

Greg Moody ([22:55](#)):

Right.

STEPHEN OLIVER ([22:55](#)):

So, they got a copy of the magazine and they got it autographed and they got the DVD, but that's what you do. Right?

Greg Moody ([23:02](#)):

Yeah. Imagine somebody was a prospect in the other example, and they were emailed, mailed and texted a link for it to show up on your webpage, the TV article or the TV interview about the specific topic that related to them. How would that affect them versus them finding some other financial advisor? It would be incredible. They're going to go with you whenever the time is that they're ready to go with you. So, the statistic we heard recently was 60% of people are unhappy with their current financial advisor and half of those are actively moving. Yeah. Thinking of moving. So, you've got a lot of opportunity out here, but you've got to not be the same as everybody else.

STEPHEN OLIVER ([23:51](#)):

Well, and to make it simple, we always start with, how are we going to add 10, 20, 30, 40,000 a month in revenue? Right?

Greg Moody ([24:01](#)):

Revenue, not assets under management, but revenue in your pocket.

STEPHEN OLIVER ([24:05](#)):

Right. Money coming in the door.

Greg Moody ([24:07](#)):

Right.

STEPHEN OLIVER ([24:07](#)):

And then, how are we going to do that in the least expensive way possible? And that's picking up the money that's on the floor that nobody knew was there without somebody like us looking at the practice and showing it to you in many cases. But then it's, what list do I have? Right? Do I have a list of people who've raised their hands? Do I have a list of people who are referrals? Do I have a list of people that I talked to and didn't turn into clients? Do I have a list of people who used to be clients who aren't clients now? Start with lists of people that somehow you've touched already and then say, "What are my personal resources? What are my staff resources? What resources do we have already?"

STEPHEN OLIVER ([24:55](#)):

One of them, Suzanne, she's sitting there in an office building and she's surrounded by other little businesses that all should be feeding her traffic, and she's never bothered to talk to any of them. Right?

Greg Moody ([25:07](#)):

Mm-hmm (affirmative).

STEPHEN OLIVER ([25:08](#)):

And she had a estate planning attorney that they shared a conference room with. I mean, literally, they would schedule the conference room and they shared a conference room in a shared office space, and she had never had a conversation with the estate planning attorney.

Greg Moody ([25:24](#)):

Wow.

STEPHEN OLIVER ([25:24](#)):

Right? I mean, that-

Greg Moody ([25:27](#)):

That's money lying on the floor.

STEPHEN OLIVER ([25:29](#)):

That's beyond that. That's money stacked-

Greg Moody ([25:31](#)):

Yeah. And as we're talking about this, you guys can write down things that we're... Some ideas from what we're talking about.

STEPHEN OLIVER ([25:38](#)):

Yeah. But think about what are your hobbies? What have you done in the past? What interesting... The other thing is who do you know? Right? Within my own business, I had the president of Wells Fargo, I had the chief financial officer for the Denver Broncos, I had the marketing director for the Denver Nuggets. And if you go through that list of who was already clients and don't utilize that... We had the president of a 780 million electronics chain. Well, I mean, they were a high end store. They had a big, good client list. Right? So, you start thinking about, who are my current clients and how do they reach out? Who are my friends, but what organizations, different things, are they attached to? What are my hobbies and how do I leap frog off of that? And also, then you go through all the lists of people you've already interacted with in some way.

Greg Moody ([26:43](#)):

Right. And that last one you just mentioned, that's the really fast ones you can attack. Because those guys can get email, mail, outbound phone calls, and you can be setting appointments and doing meetings with people today.

STEPHEN OLIVER ([26:58](#)):

Yeah.

Greg Moody ([26:59](#)):

And yet, somebody that might have been a lead a year ago, people tend to ignore and not ever talk to again. And those people, if they... If it's September and last September, they were interested, the assumption is they weren't interested ever again. And that's just a horrible assumption. They certainly... This might be the time for them to be interested. And we need to... Now you may be thinking, "Well, I don't know how to call them. What do I say?" That's what we can help you with. And at AdvisorWealthMastery.com, we've got a lot of resources-

STEPHEN OLIVER ([27:34](#)):

To help you, yeah.

Greg Moody ([27:34](#)):

Whole bundle of free resources to help you with that. So, make sure you go there and get that package. But you can call them, and if nothing else, you can take that list of prospects, of all the stuff we talked about, the list of prospects, of people that have raised their hand said, "We want some information. We want to talk to you." But maybe they even talked to you and they said, "No," that they didn't want to work with you at this time. They're still a hundred times more likely than just somebody that you bought a list from, or if you walk down the street and talk to somebody, those guys are still more likely to be a future client than anybody else. So you could just, if nothing else, start calling them. But ideally, you're calling them, emailing them, texting them and doing the other things that we talked about already.

Greg Moody ([28:20](#)):

So that's a gold mine right there. The next layer are these other ones that we talked about and all of that stuff is money lying on the floor that we can help you with first. That's our first line of attack. We have literally seen doubling a business within months just by attacking this stuff. It's not that we wouldn't want to do all the other things that we've talked about in other segments, of building out a robust marketing plan, and we want to do that to make the business healthy, but we start with this first.

STEPHEN OLIVER ([28:52](#)):

Yeah. Yeah. Well, and so to summarize it, because we're going to run out of time here. You start with looking at what's internal. It's like the podcast, we were going to kick off the podcast and do all that stuff a few months ago, and I sat down with a blank legal pad and said, "Well, who might be an interesting guest?" Well, I have Jordan Belfort's college roommate, best friend. He might be interesting. I have a good friend of Dick Grasso who used to be in charge of the New York Stock Exchange. He was in charge of the New York Stock Exchange during 9/11. Of course we have the former police commissioner of New York, but tied to the financial industry, the wolf of Wall Street and the head of Wall Street. Now, I haven't... Well, I've been to Stratton Oakmont, and all that stuff before it imploded.

STEPHEN OLIVER ([29:39](#)):

But I don't have a direct tie to either one, but I have good friend who will probably do anything that I want, who can do that. And so, you start going through the list and say, "Well, who do I know? Well, I mean, I know the guy who used to be Wells Fargo, and I know the guy who is on the board of directors at McDonald's," and you start going through the list and it's like, well, firsthand or secondhand, most of us have this big database.

Greg Moody ([30:04](#)):

Right, right.

STEPHEN OLIVER ([30:04](#)):

It's like with Suzanne. Okay. You were an actress, who do you know in that industry? You were a standup comedian. Who do you know there? All of a sudden you start coming up with all kinds of interesting names.

Greg Moody ([30:14](#)):

Sure.

STEPHEN OLIVER ([30:14](#)):

Or people who have a big group organization they're involved with. But anyway, we got to call it. Anything last-

Greg Moody ([30:21](#)):

No, I think that's what you want to start with. So start making that list of people in the groups that we talked about, but make sure you go to AdvisorWealthMastery.com and get the free packages stuff. That'll give you some target ways to start attacking those groups as well. And you can watch some of our other segments to get some more content.

STEPHEN OLIVER ([30:38](#)):

Yeah.

Greg Moody ([30:39](#)):

Very good. Thank you.

STEPHEN OLIVER ([30:40](#)):

All right. Thanks everybody.