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THREE SIGNS THAT YOUR PROFESSIONALS ARE EXCEPTIONAL

You want to work with top advisors and other professionals who are capable of helping you fully pursue your key goals. Here's how to size them up—and the three key traits they all should possess.

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Three Signs That Your Professionals Are Exceptional



KEY TAKEAWAYS

- Exceptional pros get to know their clients on a deep level.
- Exceptional pros assemble teams that work in concert with each other on clients' behalf.
- Exceptional pros use systematic processes that help clients know where they're at and how they're progressing toward their goals.

As someone looking to make smart decisions about your money so you can live a life of significance, one of your biggest goals should be to ensure you're getting value from your professionals—the wealth managers, lawyers, accountants and similar experts you rely on for guidance. This becomes especially true as your level of wealth grows over time and your financial concerns and objectives become increasingly complex and important to you and your loved ones.

With that in mind, consider how you would rate the following nine statements in terms of their accuracy as they relate to you and your experiences.

Not at all accurate								Extremely accurate	
1	2	3	4	5	6	7	8	9	10
___ The professionals I work with really understand me as a person (including my hopes and dreams as well as concerns and anxieties).									
___ The professionals are very good at explaining concepts, ideas, opportunities and solutions to me (and others) in a way that is clear and understandable.									
___ I have a sincere and trusting relationship with the professionals I'm working with.									
___ The professionals I work with are consistently able to access best-of-class expertise and solutions.									

- ___The professionals I work with consistently are able to attain the expertise I need and want on an expedited and cost-effective basis.
- ___Because of the professionals I work with, I'm able to "jump the line" when it comes to getting the solutions I need and want.
- ___The professionals I work with constantly take steps to catch and correct any mistakes or potential problems with what we are doing or are considering doing.
- ___The professionals I work with regularly employ "What if?" scenario thinking to identify possibilities and opportunities in order to determine the very best courses of action.
- ___The professionals I work with make sure I'm staying on track and following the best possible course of action, or they determine whether an alternative approach would be more appropriate and effective.

Assessing your answers

In our view, each answer you rated a 1, 2 or 3 means that an important element of your working arrangement with the critical professionals in your life is far from optimal. You might want to think of these answers as colored red (as in red flag).

Answers that you rated 4, 5, 6 or 7 often mean that the element in question is in progress but your professionals could do better. Think of those answers as colored yellow.

The 8-, 9- and 10-rated answers indicate that the professionals you rely on are where you want them to be—they're adding real value to your financial life in these areas. Consider them colored green.

If all your answers are red—which we believe is highly unlikely, as most people work with at least one expert who is genuinely helpful—think of it as a tremendous opportunity to dramatically improve your relationships and your financial life. If some answers are yellow, think of that as a less dramatic but still important opportunity to make improvements.

Take a moment to consider what it might mean if you could rate every statement an 8, 9 or 10.

- How might your life and your financial world improve?
- How would your ability to take care of the people you love and the causes you care about be enhanced or even optimized?

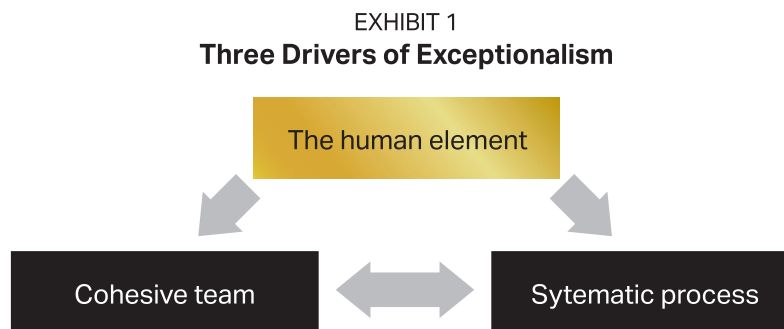
Three drivers of exceptionalism

Clearly, it would be both nice and beneficial to have all of your answers in that coveted 8, 9 or 10 “green zone” category. The good news is that you can find professionals who meet that goal or who are actively in the process of getting there.

Achieving an optimal financial world for you and the people you care about most is largely a function of three key drivers:

1. The human element
2. A cohesive team
3. Systematic processes

These drivers (see Exhibit 1) are fundamental to all types of professional relationships and tend to be very characteristic of the relationships we see between top professionals and highly successful individuals and families.



Let's examine each of these drivers more closely.

1. The human element

This powerful driver is essential because it addresses the quality of the relationship you have with the professionals you engage. In our experience, the way to consistently get great results is to work with professionals who truly and deeply understand you—and who are able to communicate with you in a way that truly resonates with you. This is what we call the human element—the extent to which advisors and other experts who serve you get to really know you “beyond the numbers.”

When the human element aspect of relationships is strong, the professionals you work with know who you are and what matters to you (as well as what doesn't matter!). Only by being so in tune are they able to coordinate solutions that best serve your specific needs and wants.

A strong human element also means professionals know how to frame their messaging and recommendations so you understand them at the level required in order to make informed choices. Without understanding you and being able to communicate with you very effectively, it is virtually impossible for a professional to conceive of and deliver the very best solutions.

Bottom line: If the professionals you are working with are deeply attuned to the human element, the first three statements in the evaluation tool above will be green.

2. A cohesive team

When it comes to your overall financial life and its many moving parts (which might include investments, tax management, estate planning, philanthropy, business operations and so on), it is extraordinarily unlikely that one single professional can do everything you need and want. In our experience, no single expert—not even the smartest or hardest-working one—possesses the full range of knowledge that affluent clients require. That’s why we believe you need a strongly motivated team of experts.

That said, it takes more than just any old roster of skilled professionals to pursue exceptional outcomes. Those professionals also need to be able to work together seamlessly on your behalf. That’s the “cohesive” part of the team equation. Referrals to other experts are good—but what can really make the difference is all the experts coming together to work collaboratively and creatively on your behalf. When that happens, there is typically one professional—often a wealth manager or an accountant—who coordinates the team and the process of working together. The end result can potentially be ideas, plans and solutions that wouldn’t have been thought of if each professional stayed working in their own “silo.”

Establishing and coordinating a cohesive team is hard work, but it can be a key driver of getting the best possible outcomes.

Bottom line: If the professionals you are working with are able to put together and coordinate a cohesive team, the second three statements in the evaluation tool will be green.

3. Systematic processes

Some professionals deal with their clients in a haphazard, disjointed manner—an approach that makes it essentially impossible to get optimal results. On the other hand, there are proven methodologies to ensure that you get ideal, integrated results. When you have a professional adeptly coordinating the efforts of other experts on your behalf and doing so based on proven methodologies, you can enhance the likelihood of achieving the best outcomes.

One such systematic process is called stress testing. This is a process that is being employed by more and more advisors to ensure that any errors in planning or strategies are rapidly corrected and any important opportunities that have arisen are examined and implemented if needed. The power of stress testing is so significant that it is being adopted by a wide variety of affluent individuals and families.

Additionally, a variation on stress testing can enable the professionals you work with to make certain that your situation is continually improving. This entails ongoing monitoring of meaningful changes happening in your life and the lives of your loved ones—there's that human element aspect at work again—as well as changes occurring in the private wealth industry and related industries. It also involves rapidly responding to financial innovations as they occur.

Bottom line: If the professionals you are working with use systematic processes to engage with you and your finances, the final three statements in the evaluation tool will be green.

Striving for excellence

As you're probably well aware, not all professionals possess and leverage these three drivers of exceptionalism. Those professionals are more limited in what they can accomplish for you, your loved ones and the causes that matter to you.

Our advice: Strive for excellence by identifying and working with professionals who see the importance of being exceptional—and who have the resources in place to actually be exceptional on your behalf, or who are actively pursuing the highest levels of exceptionalism. It's one of the best ways we know to pursue optimal financial outcomes—now and in the years to come.



VFO Inner Circle Special Report

By John J. Bowen Jr.

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