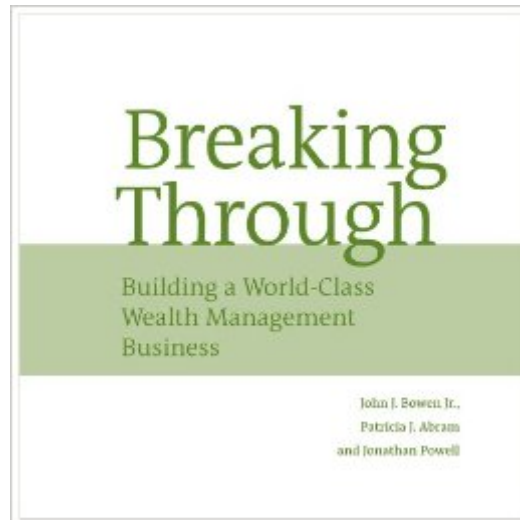


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# Breaking Through: Building A World Class Wealth Management Business



## Synopsis

The financial services industry offers enormous opportunities for financial advisors who are determined to build highly profitable businesses while serving their clients well. Despite this potential, many advisors never achieve the kind of success they have always wanted. *Breaking Through* provides a clear road map for these financial advisors. Leveraging extensive empirical research and the authors combined decades of experience in the financial services industry; the book presents a comprehensive set of proven business-building strategies. Advisors will first learn how to build a thriving wealth management practice by focusing on the right affluent clients and next implementing a consultative process that will delight and keep those clients for life. They will then learn how to build on this foundation through systematic asset- and client-acquisition techniques, effective strategic alliances with other professional advisors, and sound business management principles. Engaging, informative and thoroughly practical, *Breaking Through* will serve as a valuable guide to financial advisors seeking to take their businesses to a new and dramatically higher level of success.

## Book Information

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## Customer Reviews

This book is for every advisor who wants to build a practice that supports your vision of a great life. The authors explain how to develop a profile of your Ideal Client and how to go about building a practice that includes only people who fit that profile. It outlines a method for developing relationships with other professionals who become your advocate to their best clients. It helps you to

develop your own expert team to ensure you are delivering a comprehensive plan that helps your clients realize all their most important goals and to live their values. It also helps you work towards building a practice that has value to ensure that your clients will have access to a successor who will continue to give them quality advice and service. I highly recommend *Breaking Through* to all advisors who want to create a simple and elegant practice that clients will recognize is oriented to helping them and is not just about making money.

The game has really changed. I believe what John Bowen has unselfishly written a book that will become(necessary) for the survival today's financial advisor. The opportunities for advisors to build profitable businesses would appear to have vanished before our eyes. I mean we were all blindsided by this financial crisis. I happened to have read John's book during the worst days of the financial meltdown and I have to tell you. I believe what he is telling reader's is even more valuable today than last week. I have been through a similar period in 1974. I watched brokers never recover from the initial shock, but the ones that did had something the others were missing; a plan to follow (I was one of the lucky ones because someone shared with me their plan; my firm didn't have any idea what to do) The people that stayed and followed a plan built huge business, attracted more wealthy clients, helped more people and captured unforeseen opportunity. The ones that didn't were gone so I can't tell their stories. What I do know is (Now) more than any other period in our financial history do we need guidance, direction and leadership. The author understands how to present his ideas in a clear and useable way. He has taken complex subjects and made them understandable (a feat in itself) but more important his book provides the action stpes needed to thrive while others will just tread water. I haven't read anything in long time that provides that type of leadership and practical knowledge. That's why I gave a five stars rating. This book can make you better than you think you are. Your future clients are counting on you. Larry Chambers author of 49 books including *Credibility Marketing* and the *Attraction Marketing System*.

Having just read "Breaking Through" I couldn't wait to get to my computer and give my opinion of it. First, I was so pleased to see that the book itself was beautifully designed and printed. It made me want to read it, and not toss it on the floor next to my desk with the other piles of books and magazines. I put it on my coffee table. Each evening I read a few chapters, and word-for-word it held my interest. John Bowen and Patty Abrams are the masters when it comes to teaching and coaching advisors how to build a powerful business that is not only successful, but manageable, so you can actually have a life, too. The book is a virtual blueprint that you can customize to your own

practice. And they show you how, step by step. I am not an advisor; I am an industry journalist. Believe me, I have seen every book on marketing, practice management, sales, motivation, wealth management, etc etc. You name it. And I also know many of the various coaching and training programs very well. In my job as journalist, author, and communicator I talk to advisors every day. John and Patty's name always comes up in glowing terms as world-class coaches. I highly recommend *Breaking Through* as a must-read for any advisor looking to develop a solid high net worth wealth management business.

While the book itself is relatively short and has more of a coffee table book appearance and feel, don't let it fool you. The book is both a pretty obvious pitch for the authors' consulting practice, but also provides valuable and actionable insights into the financial planning industry. From looking at the needs and characteristics of wealth management clients to market segmentation, the book provides the reader with a thought process to frame up a business plan to differentiate and grow their practice. Using checklists and survey data, the authors show that a mere 7% of advisors have a comprehensive wealth management approach that differentiates them from the pack. Looking at the client satisfaction areas of dissatisfied versus satisfied clients, the book provides pitfalls for the advisor to avoid and develop in their practice. Finally, the book allows the advisor to look at aspects of their marketing and business development approach as an entrepreneur and business owner rather than just an advisor - including strategic partnerships, sale and transition of clients, and business planning. All in all, while not an in depth look, it will get you thinking and provides valuable market research insights. Worth the relatively quick initial read, and likely a reference guide ongoing after that.

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