



EXPERIENCE

Action & Accountability Guide

Tom Hakim



HAKIM
FINANCIAL INC

WEALTH MANAGEMENT
CONSULT — ADVISE — IMPLEMENT



ADVISORS
EXCEL



FROM IDEAS TO ACTIONS

1		1		1	
2					
3		2			
4					
5		3			
6		4		2	
7					
8		5			
9					
10		6			
11		7		3	
12					
13		8			
14		9			
15		10			
16					
17		11			
18		12			
19					
20		13			
21		14			
22					
23		15			
24					
25					



GOALS

SHORT TERM

1.	4.
2.	5.
3.	6.

LONG TERM

1.	4.
2.	5.
3.	6.

WHY?

1.	4.
2.	5.
3.	6.



AE EXPERIENCE

To know how many 1st appointments you need to maintain throughout 2020 so you're not just IMAGINING your goals, all it takes is a little calculating!

Total Asset Goal For 2020: \$ _____

of Weeks Planned to Work in 2020: _____ weeks

Avg. # of 1st Appts to Acquire New Client _____ 1st appts

Current Avg/ New Client Account: \$ _____



AE EXPERIENCE

Now that you've got those figures, all you have to do is some simple math!

DETERMINE TOTAL NEW CLIENTS FOR 2020:

$$\begin{array}{ccccc} \$ & \underline{\hspace{2cm}} & \div & \$ & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} \\ & \text{Total Asset Goal} & & \text{Current Average New Account} & & & \text{New Clients Needed} \end{array}$$

DETERMINE TOTAL NUMBER of 1st APPOINTMENTS IN 2020

$$\begin{array}{ccccc} \# & \underline{\hspace{2cm}} & \times & \# & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} \\ & \text{New Clients Needed} & & \text{Avg \# of 1st Appts to Acquire New Clients} & & & \text{1st Appointments for 2020} \end{array}$$

DETERMINE TOTAL NUMBER of 1st APPOINTMENTS PER WEEK FOR 2020

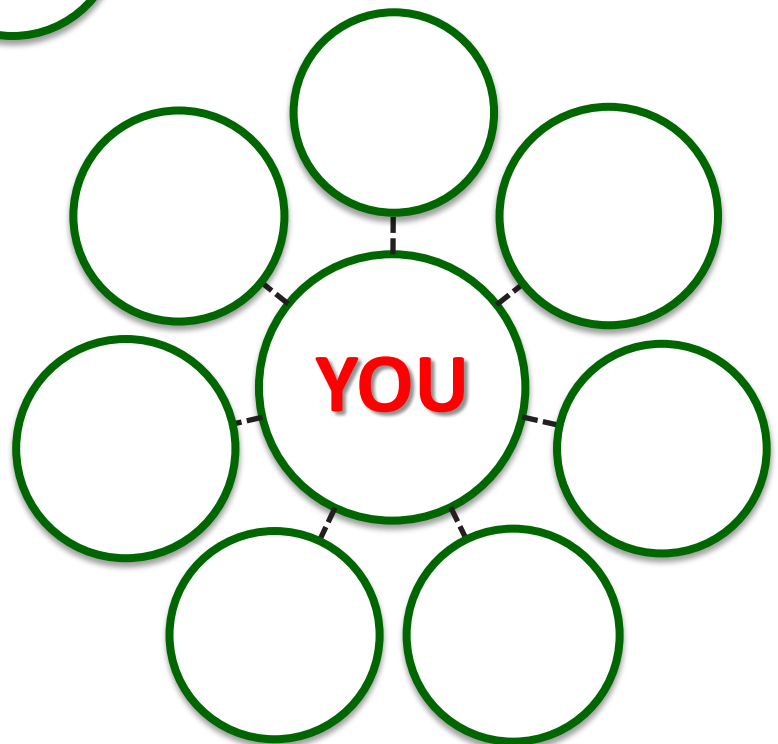
$$\begin{array}{ccccc} \# & \underline{\hspace{2cm}} & \div & \# & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} \\ & \text{Total 1st Appts for 2020} & & \text{Work Weeks in 2020} & & & \text{1st Appts Needed per Week} \end{array}$$



NEXT 12 MONTHS MARKETING PLAN

MARKETING FUNNEL	# OF EVENTS/TIMES EXECUTED	# OF NEW APPOINTMENTS	COST PER EVENT	ANNUAL BUDGET
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____
6. _____	_____	_____	_____	_____
	TOTAL NEW APPOINTMENTS	_____	TOTAL ANNUAL BUDGET	_____

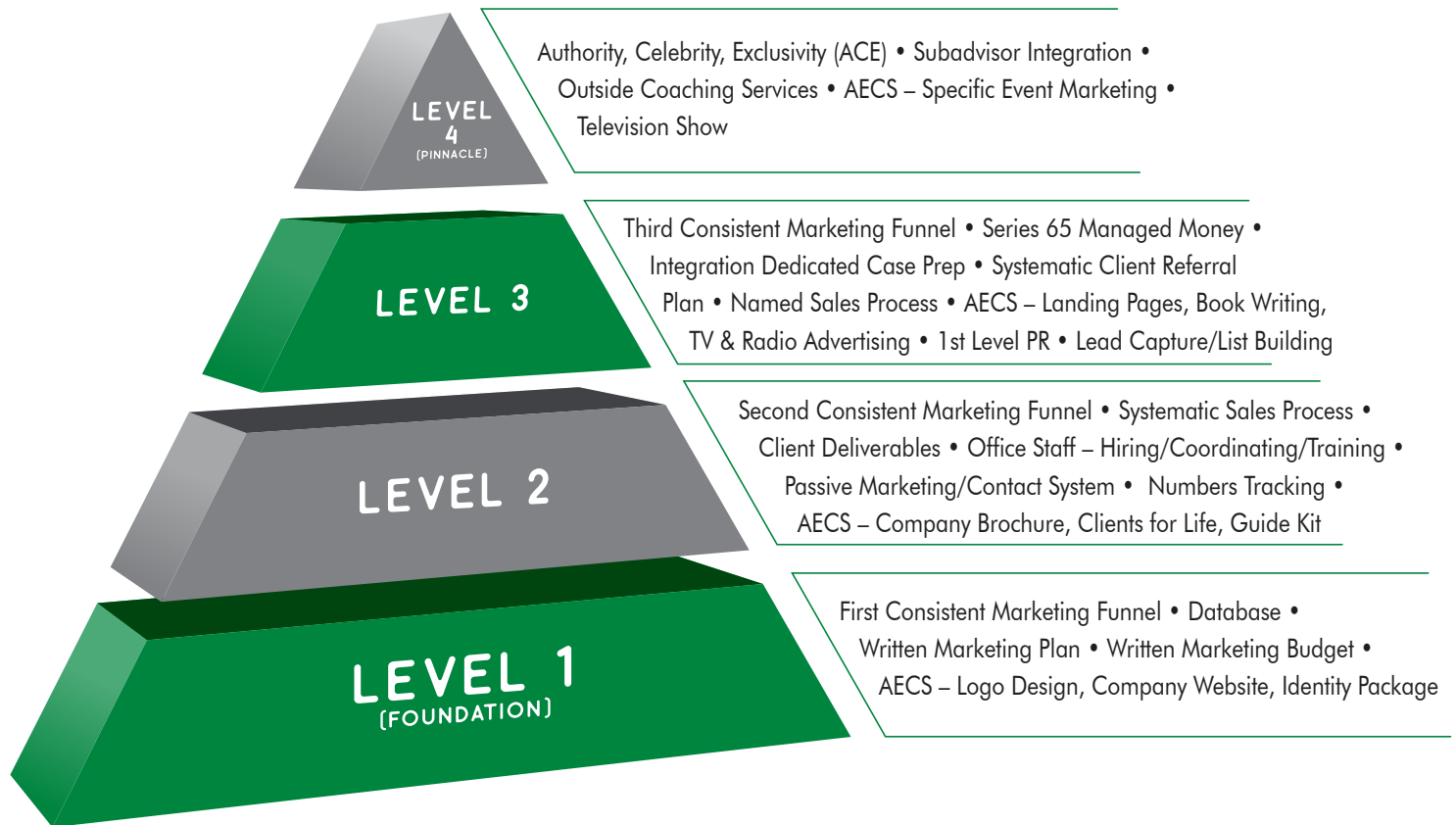
A TRUE MARKETING WHEEL





MARKETING MATRIX

	New Lead Generation	Existing Client Marketing
Active Strategies	- Seminars - White Glove Workshops - Sponsored Seminars - Radio Show - TV Show - College Classes - Niche Markets	- Appreciation Events <i>(Entire database, bring-a-friend, VIP, etc.)</i> - Informational Events - Double Dates - Birthday Parties - Ambassador Event
Passive Strategies	- Weekly E-Newsletter - Buy or Die Mailers - Landing Page Advertising - Radio Advertisements - TV Commercials - Website - Social Media - PR/Celebrity - Billboards	- Hard Copy Newsletter - A+ Client Process - Birthday/Anniversary Cards - Birthday Cakes - Referral Program - Red Carpet Letters - Holiday Cards - Welcome Kit - Holiday Pies



THE BUILDING BLOCKS TO GROWING A FINANCIAL ADVISOR FIRM ON A STRONG FOUNDATION



12 MONTH IMPLEMENTATION PLAN

IMMEDIATE IMPLEMENTATION

1. _____

3. _____

2. _____

4. _____

Top 3 Initiatives for Company in 2020

Focus on only these 3 things. Implement these first before moving to next initiatives.

Initiative/Task

Responsibility

Date

1. _____

2. _____

3. _____



AE EXPERIENCE

RESOURCES



KNOW YOUR NUMBER

Annuity Premium (\$ _____) x 7% Commission = \$ _____ per year
+ AUM Revenue \$ _____
+ Life Revenue \$ _____
TOTAL REVENUE \$ _____

_____ / _____ hours/year = _____ per hour

REVENUE ACTIVITIES

1.

2.

Current Time Spent Weekly: _____

ITEMS TO DELEGATE – CURRENT TIME SPENT

1. Paperwork/Applications: _____

5. Technology/Systems: _____

2. Follow-ups: _____

6. Appointment Setting: _____

3. Marketing: _____
(Seminar prep, Radio prep, Drip marketing, Client Event prep)

7. Staff Management: _____

4. Case Prep/Design: _____

8. Client Service: _____
(Phone calls, Emails)



CALENDAR OPTIMIZATION

MON

TUES

WED

THURS

FRI

--	--	--	--	--



AE EXPERIENCE

VIP CLIENT GALA