

**FINISH STRONG**

# How to Finish Strong & Build Momentum for Next Year



One of my favourite quotes, often attributed to Confucius, is: "Dig your well before you're thirsty."

As a Financial Advisor, you know the importance of planning, risk management, and the power of compounding for clients. But do you apply this same consideration to your business? If you want next year to be tremendous, it's important to carry over as much momentum as possible from this year. The best way to do that is to start planning for Q4.

I'm reminding you of this because in recent conversations with Financial Advisors, I noticed a large number seem to dwell on what's out of their control. They are pessimistic about the future.

Andy Grove, the founder of Intel, was accurate when he said, "Only the paranoid survive."

Yes, I agree that there are certain benefits to negative thinking. However, it also pays to be optimistic, focusing on what you can control.

For instance, take the construction of the Empire State Building that began in 1930. For a long time, it was the tallest building in the world. Instead of focusing on how that's no longer the case, you can focus on what it resembles: maintaining resilience and development, despite tough times (it was built during The Great Depression).

I encourage you to take the same approach, adhering to your vision and being confident in your business, despite uncertainty.

## DON'T REINVENT THE WHEEL

Now is not the time to experiment with untested ideas. There are many shotgun marketing concepts that can be costly and time consuming, setting you up for disappointment. You'll expend considerable effort with non-existent returns. Take a proven approach that numerous elite Advisors have relied on to pave the way for a solid Q4 and beyond.

At Pareto Systems, we urge Financial Advisors to work closely with clients who are already aware of their abilities and guiding them to naturally share their capabilities with others. Remember: your Most Valuable Prospects (MVPs) are the friends and family members of your existing clients. But your clients will have the most persuasive impact on their network. That's why it's important to lay out a plan that strengthens and maximizes those relationship opportunities.

The following is a proven process, consisting of actionable strategies that you can implement and translate into results, quickly and predictably.

## STEP 1: THE CALL ROTATION

Make a list of your top 50-100 clients, and put them into a 90-day call rotation. Your goal isn't to share profound news — simply touch base to check in with them, and see how they are doing. Use FORM as your guide. Ask them questions about their: family, occupation, recreational interests, and relevant comments about money and markets.

## STEP 2: SEND YOUR BEST CLIENTS A THANKSGIVING CARD

Many Advisors send their best clients a holiday card in December, and that is fine. However, a Thanksgiving card is unique and really captures your client's attention. Captivation is key, as people receive an abundance of mail and will only keep what matters most to them. That's why the cards you send need to have a tremendous impact and shelf life. The better the card, the more people will read and remember it, keeping it out of their trash cans. I encourage you to put this phrase in the card you send:

*We would like to wish you and your family all the best for the Thanksgiving holiday. We'd also like to thank you for a great relationship.*



## STEP 3: SEND YOUR BEST CLIENTS A HOLIDAY "STATE OF THE NATION" LETTER

You can enclose this letter in your holiday card or send it as a standalone. It isn't designed to be a data analysis of the markets. Instead, it's a statement of what you have learned over the past year, and how you will be investing this knowledge into the future and the futures of your clients.

Emphasize the messenger over the message. That means sharing applicable, relatable details of how you and your family will be spending the holidays. This helps you connect with your clients on a personal level.

## WILL YOUR CLIENTS BE READY?

Keep in mind, there is a concept in marketing called "Stage of Readiness." You don't know when a friend or family member will be ready to listen to a client about their experience of working with you. But when they are ready, this process helps your client to describe you, and the service you provide, more clearly and persuasively. This opportunity is timely, as your clients will be around their friends and family members more in the next five months compared to any other time of the year.

Once you've deployed this simple and proven strategy, stay consistent. The call rotation must become a habit. Be intentional about when you remind your clients about your value-add service. Additionally, a prompt and proactive communication plan competitor-proofs your business by strengthening the trust your clients have in you and your team.

Wishing You Continued Success!

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