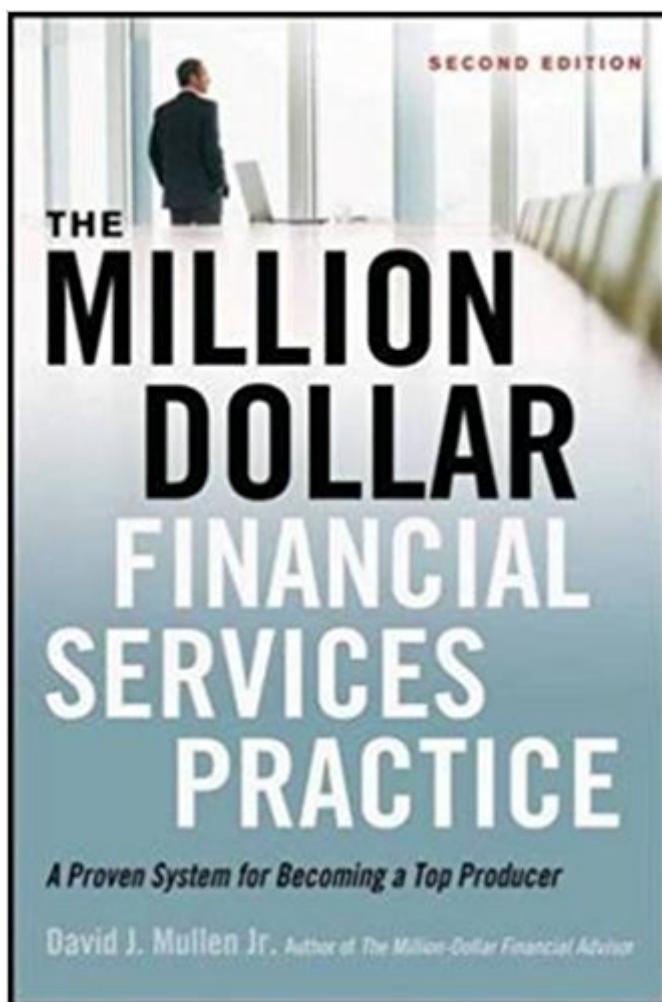


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# The Million-Dollar Financial Services Practice: A Proven System For Becoming A Top Producer



## Synopsis

Other books have claimed to help readers build a lucrative financial services practice...but it was The Million-Dollar Financial Services Practice that provided ambitious financial advisors with a step-by-step, tactical process proven to work. The second edition is updated throughout and contains new strategies for acquiring affluent clients and assets by providing Wealth Management services, using social media and "Alumni Marketing," targeting successful realtors as clients, and much more.

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## Customer Reviews

Other books have claimed to help readers build a lucrative financial services practice but it was The Million-Dollar Financial Services Practice that provided ambitious financial advisors with a step-by-step, tactical process proven to work. The second edition is updated throughout and contains new strategies for acquiring affluent clients and assets by providing Wealth Management services, using social media and "Alumni Marketing," targeting successful realtors as clients, and much more. Using the method he has taught at Merrill Lynch and is famous for in the industry, author David J. Mullen, Jr. shows how anyone no matter where they are in their career can get the appointment, convert prospects to clients, build relationships, retain clients, use niche marketing successfully, and increase the products and services each client uses.

Packed with templates, scripts, letters, and tried-and-true Market Action Plans, the book provides readers with the tools and guidance they need to take their financial services practice to the million-dollar level and beyond.

The total wealth of high-income households in the U.S. is predicted to more than double by 2020, rising to \$87 trillion—and the need for savvy, motivated financial planners to manage this money is going to rise accordingly. Are you ready to capitalize on this growth and take your financial services practice to the next level? Whether you're new to wealth management or a seasoned pro, *The Million-Dollar Financial Services Practice* will help you build your business, expand your pool of high-end clients, and increase the number of products and services each client uses. Author David J. Mullen, Jr.—a former managing director at Merrill Lynch, whose advisor training program is famous in the industry—provides everything you need to build a million-dollar practice. It's all here: templates, scripts, letters, and Market Action Plans that will help you target your niche market and turn prospects into clients. Taking a prescriptive and practical approach, Mullen lays out the fundamental requirements of a successful financial services practice, and also shows how the human touch makes all the difference in this industry.

You'll learn about the five characteristics of million-dollar producers, pick up essential time-management techniques that will boost your productivity, plus get expert advice on:

- Setting and reaching goals by breaking them down into manageable and realistic parts
- Leveraging existing clients to gain new ones
- Identifying your natural markets
- Developing and retaining a loyal client base built on trust and communication

This second edition is bursting with new information and updates, including a chapter on using social media to acquire new, affluent clients and assets, valuable tips on using “alumni marketing,” and new strategies for attracting successful Realtors as clients. An expanded section on motivation will help you pinpoint the personal goals behind your desire to succeed, and then show you how to use those drivers to push yourself and your business onward and upward. With these skills and strategies in hand, you'll be able to successfully grow your business to a million-dollar practice and reap the rewards of the exploding wealth management market. David J. Mullen, Jr. recently retired as a Managing Director at Merrill Lynch, where he personally hired, trained, and managed over 500 financial advisors. His advisor program has had a consistent success rate of twice the industry average, and his methods have been adopted by many managers and advisors firm wide. He has worked directly with over 100 individual million-dollar and multimillion-dollar financial advisors. Mullen is also the founding partner of Altius Learning ([www.altiuslearning.com](http://www.altiuslearning.com)), a training company specializing in the financial services industry, and the author of *The Million-Dollar Financial Advisor*.

If you're an advisor, whether you need a push or not, and regardless if you're new to the business or an old hand, this book is for you and a don't miss. Mullen does a nice job describing what he sees as important executables - and should as he was in the industry for many years as a branch manager. The scripts are well done, but of course you'll want to tailor them to your style. He's a huge advocate of doing/following/mimicking the success of million-dollar producers and follows this theme throughout the book in great detail. This book is third in line of important books to read if you're an advisor and is only behind Nick Murray's "Game of Numbers" and "Behavioral Investment Counseling", but it's a book that should add value to your practice. Mullen also authored "The Million Dollar Financial Advisor" but it simply isn't near as good as this book and would be much further down my list of books in this category.

I like the simple and practical format of the book on a complex and legally complex industry with non legalese language but very practical advise and strategy. I recommend the book to anyone considering starting a financial advisor business or marketing related profession. I have it the 4 star rating based on the valuable and simple way of teaching the subject.

This is an excellent resource for the new or seasoned practitioner looking to take their practice to a new level. From tactical plans to midsets, to tips and tricks for the advisor. Drawing on Mullen's decades of experience as an advisor, manager and trainer for some of the largest firms in the country, the success tactics are actionable and specific. The approach Mullen uses is complete with sample scripts, practical data points historical data and specific best practices that are actionable for the advisor to apply and implement in their practice immediately. The book will give a thought of marketing plans, specificity of market, thoughts of how to target specific markets, as well as the approach to use within the specific target markets. If you are an advisor, broker, accountant, or other financial services professional, this book will give you great advice, specific best practices and actionable plans to establish, grow and manage their practice. A must have.

I was actually reluctant to purchase this book because of all of the great reviews. I thought they had to be given something in return for a favorable review. But this book IS THE REAL DEAL! I purchased it (kindle version to receive quicker) because I need a business plan to present to prospective financial brokerage firms....and I have had writers block for two months. I have received some good information from a few advisors that I know who are now 20 years in the business and independent, and though their advice was helpful, they didn't give me anything concrete to put in a

plan. Bottom line is this. If I would have had a plan like this 12 years ago when I started real estate, it would have been game over by now. If you want to write a business plan that you can implement and be successful with, buy this book right now. I can't say enough good things about this book. The only thing though, for you and I, is that once this plan is complete, work our fricken tails off. Buy this, create your own plan and follow it. I can't believe this author doesn't have a big online presence or following. Most of this information applies to other service industries as well. Good luck and much success to you.

Great Product! Worth the money!

Good information

our son likd it

A very good book on the fundamentals. It is more broad than deep but overall does a solid job laying out the principles and steps needed to succeed. Additional reading and practice in specific areas will be necessary, but this is probably the best book on the subject I've read to date.

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