

The Efficient Advisor, LLC.

A Consulting Firm for Financial Advisors

Process Descriptions

The Financial Freedom Planner™: A visually unique financial plan packaging system designed to create a powerful vision for clients and provide confidence about their future. It is designed to help you overcome the dangers of working for less than your worth, shortage of time and lawsuits.

The Dynamic Asset Allocation Program™: A proactive investment strategy for your conservative, moderate & growth clients. Weekly model implementation recommendations that correspond to changes in the economic cycle and trend analysis are emailed directly to you, saving you time and resources in building your own client portfolios.

The Successful Marketing Solution™: A marketing process designed to help you develop and successfully market 1st class educational seminars, creating an endless pipeline of prospects.

The Practice Management Process™: A process to help Financial Advisors more efficiently manage their practice to enable clients and associates to achieve their life and financial goals.

Consulting Package Pricing Structure

1 System = \$2,500

2 Systems = \$4,500

3 Systems = \$6,000

*Each is a One-Time Fee

**Yearly Subscription Fee Starting In Year 2 = \$500

The Dynamic Asset Allocation Program™ = \$1,000/year

(this system is sold separately and not included in the above mentioned pricing)

The Financial Freedom Planner™

Name: _____ Date: _____

Address: _____

Phone: () _____ Branch #: _____ FA# _____

Email Address: _____

I wish to pay by MasterCard Visa Check (make payable to The Efficient Advisor, LLC.)

Name as it appears on card: _____

Visa/MC # _____ Exp Date: _____

Production Summary:

Training Options

Previous 12 months gross revenue: _____

Tulsa

Assets under management: _____

Phone/Internet

of years in industry: _____

Referral

If you know an advisor whose practice would benefit from the concepts of The Efficient Advisor, please give us their contact information.

Name: _____

Address: _____

City: _____ State _____ Zip Code _____

Email Address: _____

Consulting Services Include: Training Materials, Website Access & Training, Weekly Coaching Calls During Rollout/Training , Ongoing System Upgrades, Audio & Video Tutorials