MAX BOLKA
Comprehensive Business Consulting
Elite Advisor Mentoring * Guaranteed Marketing Programs
Financial Advisor Exit/Succession Planning & Implementation
Comprehensive Legacy & Estate Planning * Master Planning For Business Owners
Income / Capital Gains / Estate / Real Estate & Business Owner Tax Reduction Plans

Key Practice Management Skills To Master Specifically For Financial Advisors

Sales

Quickly Establish Credibility
Quote Fees With Confidence
Conduct Regular Client Reviews
Instantly Qualify Anyone You Meet
Successfully Win Competitive Cases
Diplomatically Handle Price Resistance
Close New Business In Just One Meeting
Convert To Fees Without Mentioning DOL
Graciously Turn Down Unqualified Business
Conduct A 4-Step Initial Client Interview Process
How To Charge Ongoing Fees For Plans & Service
How To Significantly Raise Your Average Account Size
Get Pre-Qualified Referrals Who Are Expecting Your Call
Working With Influential Family Members & Professionals
Refocus Clients From Price & Performance To Planning Issues
Systematize Your Sales Process To The Point Where It’s A No Brainer
Get Prospects Off The Fence & Unstuck, In A Sincere, No Pressure Way
Easily Obtain Everyone’s Email Address, And Why You Always Should
Coping With Market Uncertainties: What To Tell Clients & Prospects Now

Marketing

Define Your Target Market(s)
Attract & Close $1M+ Prospects
Research, Write & Place Articles
Identify New Clients With LinkedIn
Become A Professional (Paid) Speaker
Automate Your Marketing / Going Digital
Evaluate ROI For Marketing Opportunities
Select The Right Marketing Methods For You
Create & Properly Use Your Ideal Client Profile
Create A Complete, Compliant Introductory Kit
Implement A Web Site Content Management System
Write A Book To Open Doors To Your Target Market
Choose From Among 20 Low Cost/No Cost Marketing Methods
Combine Five Criteria To Create Your Unique Selling Proposition
Create Killer, Compliant Content For Marketing Brochure & Web Site
Use A Public Or Internet Radio Show To Build An Audience & Prospect List
Successfully Gain Clients Right At Your Seminar, Webinar Or Teleconference
Take A Free Cruise In Exchange For Conducting Finance Lectures Aboard Ship

Phone: (828) 713-4116
Email: max@maxbolka.com

Vision

Formulating Your Tag Line
Finding Your Life's True Work
Developing A Meaningful Mission
Define What You Do For A Living
How To Avoid Losing Business To Competitors
Create A Client-Oriented, Benefits-Laced Mission Statement
Distinguish Yourself In The Marketplace - What Makes You Unique?
Answer The Big 10 Questions Every Client Is Thinking, Even If They Don't Ask

Time Management

Regain & Stay Focused
What To Do With Your Goals
Managing Mail, Email & Phone
Organizing Client Appointments
Avoiding Unnecessary Interruptions
Identify & Systematize Every Aspect Of Your Business
Structuring Your Time For Maximum Productivity & Minimal Stress

Staffing

Motivating Your Staff
Revealing Interview Questions
Deciding How Much Staff You Need
Where To Find Great A Great Assistant
How To Interview Potential Job Candidates
How To Hire, Fire, Train, Supervise Employees
Essential Elements In Creating A Job Description
Employee Performance & Compensation Reviews
When, Why & How To Form Or Dissolve A Partnership
How Not To Go Backwards When Your Assistant Leaves
Developing A Compensation Schedule That Won't Kill You

Business & Strategic Planning

Options For Upgrading Your Clientele
Determine Your Average Target Revenue Per Client
Calculate Maximum Number Of Clients You Can Serve
Organize Your Time So You Can Implement Business Plan
How To Differentiate Yourself When "Swimming Upstream"
Research, Select, Change & Transition To A New Broker Dealer
How To Become Financially Independent With $1 Million In Five Years
Determine Minimum Fees & Account Sizes To Meet Your Revenue Goals
Define Your Services: What You Will/Won't Offer, Delegate Or Outsource
Deciding Methods Of Compensation (Fee-Only, Fee-Based or Commission)
Planning Vacation Time, Optimal Number of Clients, Services, Client Meeting Time

(Continued On Page 3…)

Comprehensive Legacy Planning For HNW Families

Build Recurring Revenue
Scale Your Core Business
Structure & Participate In Family Governance
Attract Higher Net Worth Individuals & Families
Expand & Strengthen Existing Client Relationships
Build Valuable Multi-Generational Family Relationships
Promote Family Unity Through Open, Inclusive Communication
Define, Communicate, Implement & Perpetuate Family Legacy
Mitigate The 90%$^+$ Intergenerational Wealth Transfer Failure Rate
Incentivize Positive Beneficiary Behavior Consistent With Family Values
Increase, Protect & Share The Human, Social And Intellectual Family Capital
Network With & Provide Billable Hours For Clients' Other Professional Advisors
Capture More Assets Today By Helping To Transfer Non-Financial Assets Tomorrow
Promote Core Values, Family Traditions, Philanthropic Clarity, Impactful Experiences

Master Planning For Business Owners

Develop A "Master Plan"
Help Find The Right Buyer
Make A Plan For Life After Work
Professional Valuation Of Company
Reduce, Defer Or Eliminate Taxes Altogether
Attain Financial Freedom And Peace Of Mind
How To Collaborate With Other Professionals
Maximize The Unrealized Value Of The Business
Structure Commercial And/Or Real Estate Loans
Help Ensure Good Faith Negotiations With Buyers
Maintain Confidentiality Throughout Entire Process
Built In Continuity Planning / Succession Planning
Mitigate The 90%$^+$ Business Transfer Failure Rate
Make Timing For Exiting The Business Irrelevant
Obtain Up To 80 Cents/Dollar Income Tax Deduction
Help Ensure Sustainability After Business Owner Exits
Address Business, Personal, Financial, Tax Legal Issues
Sell/Transition Business Up To 99% From Capital Gains
Make A Plan To Successfully Handle Any "Forced" Exit
Build, Harvest & Preserve Family Wealth For Generations
Develop A Timetable To Meet Business Owner's Exit Needs
Coordinate A Team Of Credentialed Exit Planning Specialists
Blend Business Owner's Business And Financial Goals & Values
How To Decide If/When You Should Keep Or Sell Your Business
Gain More Control, Certainty, Options, Value, Security, Cash & Time
Prepare Both The Business And The Business Owner For Eventual Exit
"De-Risk" The Business, Adding Value For Any Potential Purchase/Transfer
Invest Sale Proceeds And Only Pay A Management Fee If The Principal Goes Up

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Technology

Automate Your Marketing
Research & Purchase Software
Calendar, Email, Tasks/Project Mgt
Engage Clients Through The Internet
Setting Up RoboAdvisor With JR FA Option
Back Up & Access Your Computer Remotely
Obtain Business Through Teleconferences/Webinars

Broker Dealer Issues

Working With Recruiters
How To Find The Perfect BD For You
Complete A-Z On Changing Broker Dealers
Buy/Lease Decisions For Office Real Estate
Dealing With Increased Compliance Demands
Emergency, Continuity & Succession Planning
Comparing Broker Dealers & Evaluating Offers
How To Avoid Losing A Lawsuit (And Not Go Crazy)

Creating Content

Hiring A Director Of Marketing
Obtaining Articles For The Public
Snail Mail & Email Newsletters
Develop Killer Web Site Content
Write Entire Marketing Brochures
Create Complete Introductory Kit
Draft Letters / Emails To Clients & Prospects
How To Obtain A Refund On Almost Anything
Best Ways To Send Out Birthday Or Holiday Cards

Success Is A State Of Mind

How To Be Happy
Designing Your Destiny
Consciousness & Success
Inspiration vs. Motivation
6-Step Formula For Success
How To Break Out Of A Slump
Developing A Successful Mindset
Effective Goal Setting & Achievement
Dealing With Internal/Mental Blocks To Success
Your Income Can Only Grow To The Extent That You Do
Organize & Use Your Goals To Achieve Successful Outcomes
How To Think Bigger & Earn More Than You Ever Thought Possible

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Stress Management

Ten Ways To Reduce Stress
Yoga / How To Stretch Yourself
How To Have Unlimited Energy
Develop An Effective Exercise Program
Eating Well & Feeling Good: Diet & Nutrition
Meditate Your Way To Less Stress, More Success
Living In Harmony With The Rhythms Of Nature
Gentle, Natural Ways To Cleanse Your Internal Body

Income Tax Reduction Plans

No Cost Marketing
No Additional Workload
Unique Conversation Starter
Over 50 Proprietary Tax Strategies
You Keep Planning Fee, AUM, etc.
Attract New Business Owner Clients
Use Of Statutes, Structure & Strategy
Significant, Immediate & Permanent Benefits
No Financial Products Used (No Competition)
Only Existing Regulations Used - No Proposed Legislation
Suitable For Any Business Owner - All Industries / All 50 States

Million Dollar Marketing Program

Pay-For-Results Marketing
Same Time, Money, Energy
Choose From A Variety Of Partners
Have Your Marketing Done For You
Ave 20% Closing Rate With 10x ROI
Add $100k Recurring Revenue Per Year
Get $1M-$5M+ Prospects…Guaranteed

Elite Advisor Program

All Of The Above Plus…
Learn A Superior Sales System
How To Develop Your Emotional Intelligence
Systematize Your Client Referral Lead Process
Maximize Your Time As Chief Revenue Officer
Scale Your Business From $500k To $2.5M Gross
Access To All Systems, Scripts, Tools & Templates
Effectively Delegate To Create Exponential Growth
How To Explain & Sell Financial Planning On The Back Of A Napkin
Go Beyond Client Appreciation Events To Nurture Relationships For Life

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