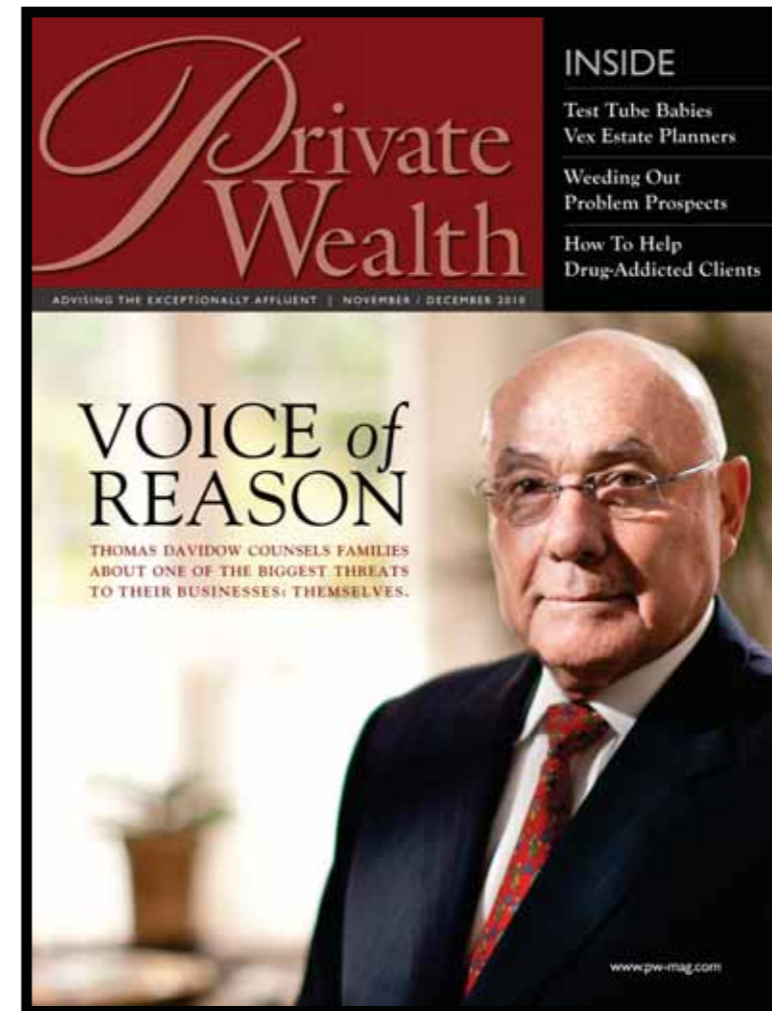


Introduction & Industry Commentary



Produced by





MY VIRTUAL COO

NO EXCUSES. JUST RESULTS

JENNIFER GOLDMAN
PRESIDENT



MY VIRTUAL COO

NO EXCUSES. JUST RESULTS

ADVISOR – CLIENT NIRVANA



**REAL EXAMPLES OF HOW TO BUILD
A SUPER COMPLIANT,
LARGE PRACTICE OF “RAVING FANS”
WITH A TIGHT BUDGET,
SMALL STAFF AND EASY-TO-USE TECHNOLOGY**



RAVING FANS

WHO ARE THEY

WHY ARE THEY

HOW DO I GET MORE





POSTER CHILD FOR COMPLIANCE

WHAT CONSTITUTES SUPER COMPLIANCE

HOW DO I DO THIS

WHAT IS THE COST





TECHNOLOGY INTEGRATION

WHAT IS IT

WHY DO I NEED IT

WHAT IS THE COST



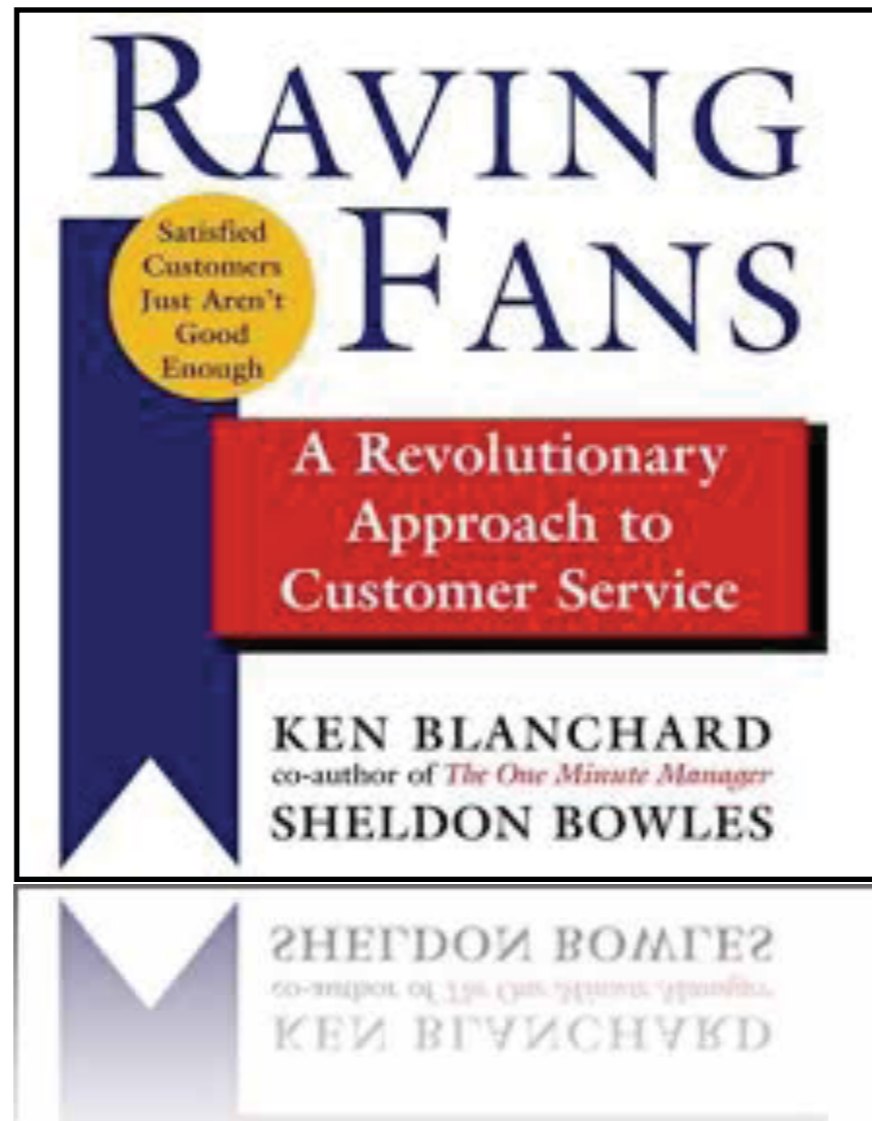


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RAVING FANS

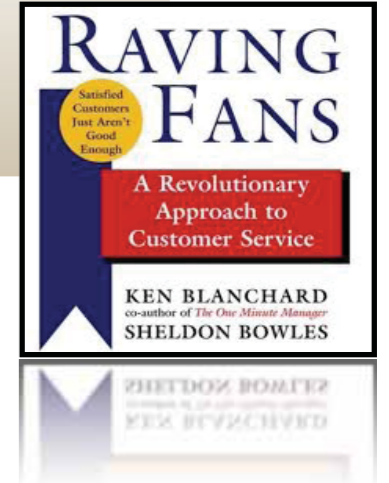




RAVING FANS

WHO

**ANYONE THAT UNDERSTANDS THE VALUE YOU BRING
TO THEM AND
COMMUNICATES YOUR VALUE TO OTHERS OFTEN AND
CLEARLY**





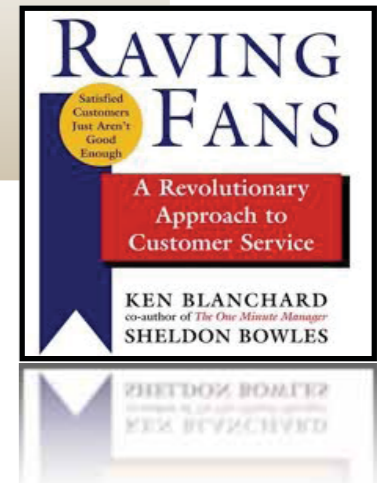
RAVING FANS

WHY

YOU LISTEN TO THEM AND RESPOND TO THEIR CONCERNS

YOU MAKE THEM FEEL APPRECIATED

**YOU LET THEM LEARN AND UNDERSTAND THROUGH
RELIABLE, CONSISTENT, CLEAR COMMUNICATIONS**





RAVING FANS

HOW

DISCOVER WHAT THEY WANT AND DELIVER + 1

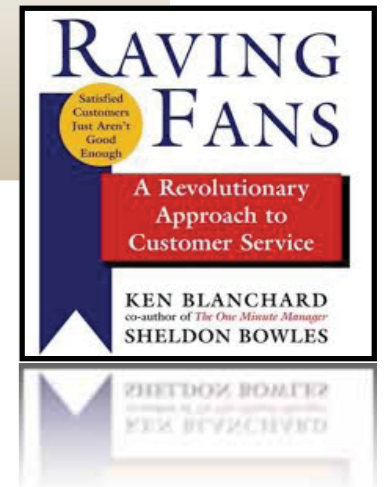
(LIST OF TO DO'S IN YOUR CRM)

ASK FOR FEEDBACK AND LISTEN

(SURVEYS AND QUESTIONNAIRES)

PROVIDE THE SAME DELIVERABLES OVER AND OVER AGAIN

(REPORT TEMPLATES AND A SET PROCESS FOR EACH COMMUNICATION)





REFERRALS

79% OF ADVISORS SAY MOST IMPORTANT DRIVER TO GROWTH IS REFERRALS FROM EXISTING CLIENTS

YET

61% DON'T HAVE A PLAN IN PLACE





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IS THE AUDITOR **HAPPY**





SUPER COMPLIANCE

ENTER DATA ONLY ONCE

BACKUP SYSTEMS

EASY-TO-PRODUCE LIST OF DOCUMENTS AND COMMUNICATIONS

COMPLETED CLIENT PROFILES

SECURITY

EASILY ACCESSIBLE WRITTEN PROCEDURES

PASSWORD PROTECTION

EXPERT, TRAINED STAFF





BASIC SOFTWARE YOU NEED

EMAIL ARCHIVING

DOCUMENT MANAGEMENT

CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

ADOBE STANDARD





WHAT DOES IT COST

EMAIL \$8/MONTH/EMAIL ADDRESS

DOCUMENT MANAGEMENT \$35/MONTH/USER

CRM \$65/MONTH FOR 15 USERS

ADOBE \$279 1X COST FOR 3 USERS

ANNUAL ONGOING COST ~ \$1,296





SOFTWARE COSTS FOR EACH AREA

CRM

\$65/month for 15 users

FINANCIALS

QuickBooks

EMAIL

\$8/month per email
address

PORTFOLIO MANAGEMENT

\$2/month/account

BILLING

\$25/month

FINANCIAL PLANNING

\$107/month per user

INVESTMENT RESEARCH

\$195/month

PHONE EXTENSIONS

\$25/month

REBALANCING

\$625/month

PRINTING TO PDF

1x cost \$299

DOCUMENT MANAGEMENT

\$30/month per full user

QUESTIONNAIRES

\$199/year

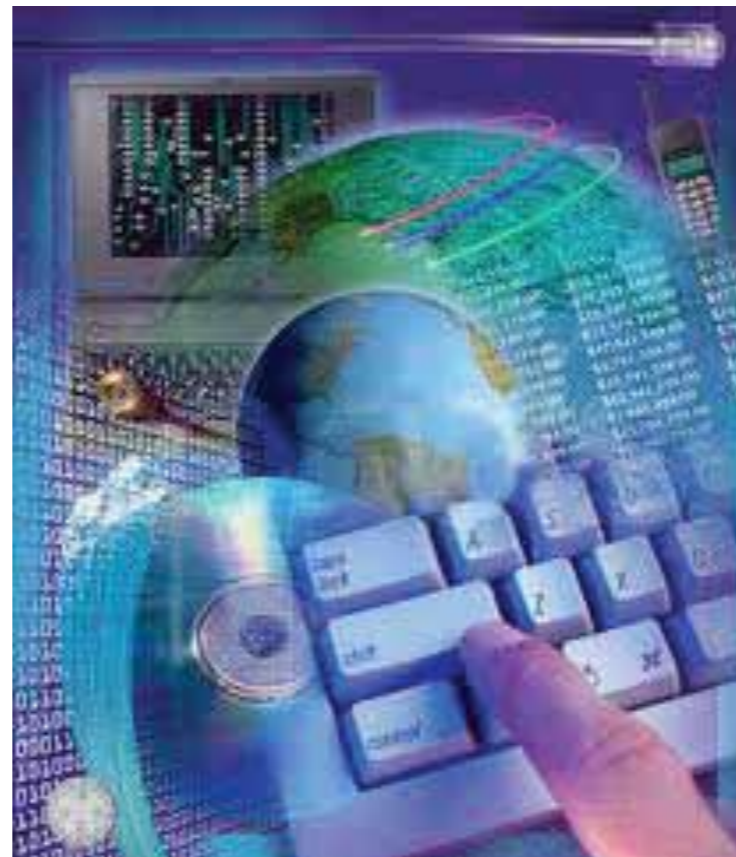


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TECHNOLOGY INTEGRATION

THE WHAT, WHY, HOW





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HUMAN LABOR



MANUAL SYNC



AUTO SYNC



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HUMAN LABOR

BOOK KEEPING	
EMAIL BLAST	
ADOBE STANDARD	



AUTO SYNC

CRM	
FINANCIAL PLANNING SOFTWARE	
INVESTMENT RESEARCH SOFTWARE	
EMAIL	
DICTATION	
CONTACTS	
SMARTPHONE	
FAX	
QUESTIONNAIRE	
RECONCILE	
CUSTODIAN	
DOCUMENT MANAGEMENT	



MANUAL SYNC

MICROSOFT	
ONLINE MEETING	
NETWORK	

AFTER



SOFTWARE



LIVE EXAMPLES

AssetBook



timetradeTM





BOTTLENECKS?

ANYONE?



ANYONE?

"A word to the wise, Harry. At this morning's meeting you were referred to as 'the bottleneck'."



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LIVE EXAMPLES

WHY YOU INTEGRATE

Precise FP



CUT DOWN ON DATA ENTRY



MONEYGUIDEPRO™
Financial Planning SMARTware

DELEGATE TECHNICAL WORK TO LOWER LEVEL STAFF
AS HIGHER LEVEL STAFF SHOULD BE NURTURING
RELATIONSHIPS WITH CLIENTS AND NETWORK





TECHNOLOGY

**FREES UP TIME TO NURTURE RELATIONSHIPS AND
CREATE RAVING FANS**

**REDUCES TIME & MONEY SPENT ON OPERATIONS
DO MORE WITH LESS STAFF**

INCREASES COMPLIANCE





DON'T BELIEVE US ? READ THE STATISTICS

CRM USAGE PROVIDES 34% REVENUE GROWTH

52% INCREASE IN LEAD VOLUME

17% INCREASE IN PROFIT MARGINS

(MARKETTOOLS INC. DEC 2008)



DON'T BELIEVE US ? READ THE STATISTICS

**45% NET PROFIT INCREASE FOR FIRMS WITH 5
COMMON TRAITS,
2 BEING **TECHNOLOGY OPTIMIZATION** AND
OUTSOURCING**

(ADVISOR BENCHMARKING 2010)



DON'T BELIEVE US ? READ THE STATISTICS

**COMPANIES USING INTEGRATED CORE TECHNOLOGY
APPLICATIONS OUTPERFORM COMPANIES THAT DON'T
INTEGRATE AND EARN
36% HIGHER REVENUE AND
30% HIGHER PROFITS**

(MOSS ADAMS 2008)



DON'T BELIEVE US ? READ THE STATISTICS

**ANNUAL SAVINGS DUE TO REBALANCING
TECHNOLOGY**

\$22,500

(TRE 2010)



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DON'T BELIEVE US ? READ THE STATISTICS

**TIME SAVED IN GENERATING MANAGEMENT REPORTS
VIA CRM 51%**

(MARKET TOOLS INC. 2010)



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RESOURCES



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www.MyVirtualCOO.com



www.VirtualSolutionsConsortium.com



www.VirtualOfficeNews.com



www.YourSilverBullet.net



www.EfficientPractice.com



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THANK YOU

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- **Complete form and follow submittal directions**

- **Program Name:** November 2, 2010 - Advisor – Client Nirvana

A recording and the slides of this presentation will be available at
<http://www.fa-mag.com/clientnirvana>

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