

LIMITLESS Coaching Call Transcript

August 8th, 2024
Personal Peak Coaching Call
Surges In Action

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00:07:49.820 --> 00:07:55.689

Stephanie Bogan: Happy Monday. Everyone, Stephanie here so pleased to welcome you to this Monday's call.

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00:07:56.067 --> 00:08:09.389

Stephanie Bogan: We have quite a treat in store for you. We're going to talk about surges, and Robbie and John 2 limitless advisors are going to share their experiences in just a moment. Before we get to the really good stuff.

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00:08:09.680 --> 00:08:30.569

Stephanie Bogan: A couple of housekeeping updates one. Our growth summit is coming up. If you have not registered, please do that. This is really all about gearing up for growth for year one making sure you're laying the tracks, setting those foundations in place. Year 2, 3, 4, alumni right? It's gearing into just deepening and developing that marketing machine.

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00:08:30.912 --> 00:08:51.810

Stephanie Bogan: If succession is on your radar. We have a new succession workshop that I'm doing with Jared from destiny capital, which we're really excited about. And then for those of you who have lifestyle bundle, or who will be joining us as an add on, we have the growth workshops. We're really excited about these. We did the 1st round in March. These are basically 2 days of half day sessions

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00:08:51.850 --> 00:09:19.059

Stephanie Bogan: where we're diving into the lesson. You've got pre work. We're digging in and developing strategies and making decisions. And then you're pretty much set to go back, refine a few things and then implement. So Alison is designed the workshop schedule, so that over the course of 2 or 3 years, if you want to take longer. If you go to those workshops, you will cover every core lesson over the course of the 2 years. So it's a really good way to just put yourself on that track

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00:09:19.280 --> 00:09:23.160

Stephanie Bogan: and get support along the way. If you're not in the bundle program

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00:09:23.440 --> 00:09:53.190

Stephanie Bogan: right upcoming calls we're going through quarterly check ins. I did intend to have this done last week. It was my 1st week back from my 30 day summer vacation. When I take long trips. I do this crazy thing. I leave a buffer between my vacation and starting work so that I don't come back to an avalanche which I typically don't in this case it was a really good thing that I did, because my safari in Kenya was amazing life changing. I'll show you some pictures. We'll do an inbox, I mean, like



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00:09:53.490 --> 00:09:55.140

Stephanie Bogan: fabulously radical

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00:09:55.698 --> 00:10:06.179

Stephanie Bogan: amazing and the last 2 days I caught the Kenyan death plague. It's not technically called that. I don't know what they technically call it, but it felt like that.

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00:10:06.260 --> 00:10:12.655

Stephanie Bogan: I didn't eat or drink for 5 days. I had to stop the hospital in Dubai just to make it home

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00:10:13.348 --> 00:10:27.811

Stephanie Bogan: when I came home through literally Dubai from Amsterdam to Salt Lake, so it couldn't have been a slightly longer trip, but we thought we were gonna stop and have fun in these places on the way back. So I basically turned myself inside out for a week, lost 12 pounds

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00:10:28.390 --> 00:10:43.229

Stephanie Bogan: And I spent last week just trying to become human again. So as I shared with the team this morning, I feel great. I feel human. I am excited for lives in the next 5 months, like game on ladies and gentlemen. We're all in

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00:10:43.601 --> 00:11:04.500

Stephanie Bogan: so if you're having any challenges. If you need to know what's next. If you need to get some mindset shifts in place, if you're meeting with resistance and you don't know why you've got specific practice issues or want to figure out exactly what you want to work on next. Then me, Adam, Liz and Natalie are all gonna be on our August 12th call.

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00:11:04.763 --> 00:11:20.020

Stephanie Bogan: Which are gonna focus on getting unstuck. We're gonna have different rooms with different coaches. So we can really give you some personal time and attention. If you need help getting over the hump you'll also get check-ins from me this week. Again apologies. I intended to send them last week, but I was dying.

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00:11:20.313 --> 00:11:23.600

Stephanie Bogan: So you're gonna get a much better message from me this week

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00:11:23.951 --> 00:11:41.240

Stephanie Bogan: our coaching call with Liz is on the 19.th If you have not come to one of those, I encourage you to do it. If you're stuck, if you're struggling, if you've got resistance. If you know you need to do something, and you're putting it off. This is a great place to go to get to get over that hump if you will.

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00:11:41.650 --> 00:11:48.490

Stephanie Bogan: and then Coach Adam will be leading his cohort. Call at the end of the month, if you're in the cohort for a little bit more, one on one attention.



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00:11:48.830 --> 00:11:55.009

Stephanie Bogan: Alright with that. Does it, Allison? Should I show my? Should I show my lion? Kill picture? Really quick.

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00:11:55.850 --> 00:12:01.469

Stephanie Bogan: Alright! If you don't want to see something being eaten, please close your eyes. So I'm gonna say.

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00:12:01.480 --> 00:12:02.650

Stephanie Bogan: cause

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00:12:02.680 --> 00:12:07.680

Stephanie Bogan: I have like a thousand 1 million of these. But this is one of the ones I just grabbed. Really quick.

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00:12:08.123 --> 00:12:16.600

Stephanie Bogan: There's like a whole pride of lions like this is like 5 feet away from me like if that lion just jumped up she could have just at me no problem.

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00:12:16.770 --> 00:12:29.779

Stephanie Bogan: It's crazy that they don't like. It's incredible. And then we got to stay at the Giraffe Manor. So this was the one photo. I got a couple of photos the 1st night there before I got like deathly ill.

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00:12:30.520 --> 00:12:48.409

Stephanie Bogan: but this was the giraffes like, come into your room and you you have to feed them at 6 in the morning. My kids were not that excited because they got the giraffe room you like. They're at your window. They cut. They let them in at breakfast and stuff. It's pretty cool. So if you have kids. It is an incredible place to take them.

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00:12:48.720 --> 00:12:49.640

Allison Foulk: That's amazing.

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00:12:49.880 --> 00:13:01.670

Stephanie Bogan: Yeah, we've got. We saw the the elusive leopard was like the highlight cause. No, you guys love the Mojo like we saw all the things people never see multiple times. They were like, she is so lucky. And I'm like, I know

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00:13:02.250 --> 00:13:12.150

Stephanie Bogan: the Mojo. It works every time. Alright, Alison, I'm gonna let you take it over. We've got Rob and John, who have substantive conversations to have with our members. So.

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00:13:12.450 --> 00:13:13.110



Allison Foulk: Yes.

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00:13:13.330 --> 00:13:17.570

Stephanie Bogan: Wind down my enthusiasm and turn it over for some heartfelt education.

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00:13:17.910 --> 00:13:40.340

Allison Foulk: Okay, awesome. Well, we are super excited for today's call today. Some of you may know our 2 guest attendees, others. They may be new to you, but we have John Bonsack, who is with Adams. Firm, and John has been there since 2021, and he is our search expert. So he knows

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00:13:40.340 --> 00:13:50.639

Allison Foulk: behind the scenes everything Adam is doing to be successful with surges that John is doing to be successful with searches at the firm. So we're super excited to show you behind the scenes there.

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00:13:50.982 --> 00:14:01.590

Allison Foulk: Second, we have Robbie Hanson. Robbie was one of our leaders members for several years, and has agreed to come back and show you behind the scenes of their surge processes.

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00:14:01.590 --> 00:14:22.160

Allison Foulk: So this is going to be super collaborative call. If you have questions. Please feel free to jump in, to let them know. We have built some time for questions throughout what they're going to be sharing with you today, but I know both of them would love just to open the conversation at any point you really feel like you need some further clarity or insight into what they're sharing.

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00:14:22.380 --> 00:14:28.390

Allison Foulk: so we will go ahead and kick off. Thank you both for being here. We are excited to have you.

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00:14:28.670 --> 00:14:38.250

Allison Foulk: so we are going to get started with a question in the chat. So I want everyone to drop in the chat. The answer to these 2 questions.

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00:14:43.680 --> 00:14:46.010

Allison Foulk: Robbie and John, you can help me

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00:14:46.190 --> 00:14:48.739

Allison Foulk: read them out as they start to come in.

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00:14:56.150 --> 00:14:57.070

Allison Foulk: see

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00:15:00.650 --> 00:15:04.900

Allison Foulk: alright, follow through on tasks after surge.

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00:15:04.900 --> 00:15:09.899

John Bohnsack, CFP®: Yep, that's a big one I saw content on there like what you cover during surge. Yep.

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00:15:10.740 --> 00:15:12.470

Allison Foulk: Okay, prep. Work.

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00:15:12.830 --> 00:15:17.260

Allison Foulk: getting clients to book a meeting ahead of time for later in the year, surge

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00:15:18.646 --> 00:15:22.809

Allison Foulk: filling behind and not getting enough lead time, schedule, wrapping.

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00:15:23.510 --> 00:15:27.190

Robert Hansen, CFP®: Sounds spot on to. We've been going through.

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00:15:27.960 --> 00:15:30.600

John Bohnsack, CFP®: That's what I was thinking, too. Yep, all these things are

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00:15:30.850 --> 00:15:32.480

John Bohnsack, CFP®: are true, very true.

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00:15:35.230 --> 00:15:49.489

Allison Foulk: Okay, integrating marketing, new prospects, urge periods. It's interesting feeling behind not getting enough lead time, scheduling, prepping before meetings actually start. I think that's something we've talked about. Okay

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00:15:49.490 --> 00:16:14.459

Allison Foulk: and awesome. Okay? So I think these questions are in alignment with what Robbie and John are going to be going through today. If at the end of the call, you still don't feel like you have clarity or or a path forward for how you might approach something that you're struggling with. We've saved some time for you to ask and dive into these questions afterward, too. But hopefully, as we go through this today.

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00:16:14.460 --> 00:16:20.539

Allison Foulk: you'll have some great ideas and see see how both of them are

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00:16:20.540 --> 00:16:22.650

Allison Foulk: dealing with some of these struggling points.

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00:16:24.220 --> 00:16:27.860

Allison Foulk: All right, Robbie, let's kick it off with our process.



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00:16:28.770 --> 00:16:29.680

Robert Hansen, CFP®: Perfect.

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00:16:29.780 --> 00:16:30.870

Robert Hansen, CFP®: So

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00:16:31.710 --> 00:16:57.000

Robert Hansen, CFP®: I think most of you have seen this document at least once, and I know they've talked through it before the team has, but it really is just such a helpful tool to kind of lay out. Here is the best practice. This is what we want to aim towards as we build out the search process. And I do want to emphasize aim towards, because we're in our 4th year surges and we're still working towards this goal of setting it up this efficiently and having a process, this detail.

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00:16:57.000 --> 00:17:06.750

Robert Hansen, CFP®: So it is again, step by step, moving target kind of thing. But as you're getting into it. I think the 4 main steps always stay the same.

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00:17:06.750 --> 00:17:20.439

Robert Hansen, CFP®: You're always having to schedule. You're having to prepare for the meetings you're having to conduct the meetings and doing the follow up. And I know a lot of these are, I mean, every aspect of that is what people just listed as concerns and pain points

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00:17:20.723 --> 00:17:37.439

Robert Hansen, CFP®: but really, as as you kind of pull things from this slide and from the conversation today, try to find one or 2 of your pain points. Figure out a solution or 2, and just work towards that. For this next surge you might be in, or the 1st surge you want to conduct and then go from there.

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00:17:37.480 --> 00:18:03.440

Robert Hansen, CFP®: So it is one step at a time. For scheduling. It's stuff like you gotta weeks out. Make sure you're actually reaching out to all clients that are going to be a part of the surge. You're inviting them to the meeting. You're automating some of that because calendar problems can cause a whole lot of other problems. So not just the 6 weeks out, 4 weeks out. Make sure you are sending follow ups, and you're actively reaching out to the people that aren't responding.

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00:18:03.827 --> 00:18:27.612

Robert Hansen, CFP®: It's a huge pain point for us has always been the people that don't get involved in the surge that really need to be, and then they drag out the surge to a longer. I guess, added weeks to the schedule, or we have to tackle those topics in their next surge meeting so as proactive as you can be, really limits some of that and then same thing with preparation, as the

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00:18:28.150 --> 00:18:39.410

Robert Hansen, CFP®: events are getting scheduled, as everybody's getting on the calendar, it kind of helps prioritize. Where do you jump in first? st Who do you start working on and building out all the content? Everything? You're going to deliver



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00:18:39.460 --> 00:19:04.651

Robert Hansen, CFP®: the meeting as well, just making sure that you are conducting the meeting. And and really the 1st 2 steps, I can't emphasize enough how important they are. So that way you are fully engaged and focused in the meetings. And you're not stressing about still prepping for what's coming up or any last second changes. So you really do need to be 100% present in the search for it. To go successful is what we found.

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00:19:05.080 --> 00:19:22.700

Robert Hansen, CFP®: and then again follow up is our biggest pain point, something we've been working on for the last few years, and I think we've got a good rhythm for now. But yeah, you have sometimes a hundred meetings in 6 weeks, and can lead to a lot of post meeting work that causes some stress. So

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00:19:22.890 --> 00:19:26.470

Robert Hansen, CFP®: just making sure you don't drop the ball on that causes a lot of help. But

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00:19:26.500 --> 00:19:33.759

Robert Hansen, CFP®: it again. We've because of Stephanie and Allison and the team. Really, as we've done this got better at

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00:19:33.830 --> 00:19:53.790

Robert Hansen, CFP®: telling clients during these meetings. We'll send this follow up to you immediately. But we're going to get to this later, maybe a few weeks from now and get back to you on this. It really is kind of laying out expectations and taking some of the pressure off you while you're trying to deliver everything from the conversation.

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00:19:56.150 --> 00:19:58.189

Allison Foulk: Awesome thanks for reviewing that Robbie.

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00:19:58.210 --> 00:20:01.040

Allison Foulk: Any additional commentary. John.

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00:20:01.460 --> 00:20:29.849

John Bohnsack, CFP®: Yeah, I I just want to emphasize what Robbie said, like the the 4 key points of scheduling preparation meeting and follow up like those are the steps. What you do underneath. Those can be customized for your practice, and can change as your practice grows like the practice that I started with with Adam is, I mean, it's completely different from what we're what we're at now. And so we've had to change that as along the way. So as you grow these these things will change as well.

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00:20:30.550 --> 00:20:31.210

John Bohnsack, CFP®: Yeah.

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00:20:31.790 --> 00:20:32.540

John Bohnsack, CFP®: awesome.



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00:20:36.490 --> 00:20:48.159

Allison Foulk: Hey? So this is our searching at your comfort level level. Cheat sheet. Essentially. John, do you want to walk us through? Kind of how you and Adam have approached this.

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00:20:48.160 --> 00:21:17.840

John Bohnsack, CFP®: Yeah, absolutely. So at the beginning, each year we schedule when we wanna have our our surges. You know, the April, May, October, November is definitely the timeframe in which we do do that, you know, for me, working at my prior firm surges were happening at my prior firm, but we were being proactive about it. They're just naturally happening. And so I do like the formality of having us a surge, because, whether you plan it or not, in in most firms you have, you? You are having a surge.

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00:21:18.170 --> 00:21:30.300

John Bohnsack, CFP®: So for for each advisor, it's planning on how many meetings you want to have per per day, you know. I've seen all sorts of numbers, but I think it has to be kind of customized to

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00:21:30.760 --> 00:21:59.310

John Bohnsack, CFP®: your service model. And what personally you can, you can handle. And how long you want to have that surge surge going, you know. Obviously, the the less meetings per day, I mean extends out your surge process. But you also have a little more free time in there and then, vice versa on the, you know, 5 meetings per day it shortens the surge process. But can get pretty

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00:21:59.310 --> 00:22:02.009

John Bohnsack, CFP®: pretty pretty intense. The

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00:22:02.220 --> 00:22:08.740

John Bohnsack, CFP®: the the calculus of it is pretty easy, because you just got to figure out how many clients you're currently serving.

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00:22:08.880 --> 00:22:21.879

John Bohnsack, CFP®: how many meetings per day you want to do. And then how many weeks that's gonna take you and just work it from from there. And that's how much you want to block out for

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00:22:21.950 --> 00:22:50.199

John Bohnsack, CFP®: 4 years surges. Personally, I add a couple of weeks to give myself a break in the surges. So let's say, I was doing 3 meetings per day. I wouldn't actually do it over 18 weeks. I'd probably do it over 20 weeks and give myself a little bit of a break. Maybe at week 9, and maybe week 15 or something like that or similar, the 5 meetings per day and 11 weeks. I might actually do it in 13 and give myself a break in week 4 9, for for example.

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00:22:52.920 --> 00:23:01.040

Allison Foulk: That's good. Do you? Do you do any kind of modifications on your end, Robbie? Or do you kind of stick to like fast and furious.

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00:23:01.400 --> 00:23:03.210



Robert Hansen, CFP®: We have

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00:23:03.260 --> 00:23:26.459

Robert Hansen, CFP®: again. It's changed so much. Just like John said. I feel like the 1st 2 years of surges we just searched every day of the year. Almost. It was a huge learning curve for us. But we've gotten a lot better with the preparation and scheduling side to where we're trying to target 6 meetings a day on Tuesday, Wednesday, Thursdays. And really trying to do surges. We

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00:23:27.136 --> 00:23:38.479

Robert Hansen, CFP®: I guess, map out 7 weeks on the calendar for each surge, but right in the middle we have a week off. So it really is getting 100 110 meetings in 6 weeks done. It's the goal.

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00:23:41.000 --> 00:23:46.400

Allison Foulk: Okay, awesome. Any questions or comments on this slide or the following one.

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00:23:49.570 --> 00:23:51.510

Allison Foulk: okay, great.

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00:23:51.610 --> 00:23:53.938

Allison Foulk: Have the process down.

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00:23:54.530 --> 00:23:56.740

Allison Foulk: Okay. Next, we.

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00:23:56.740 --> 00:23:58.379

Roshani Pandey: I have a question. Sorry?

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00:23:58.380 --> 00:23:59.630

Allison Foulk: Location. Shawnee.

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00:23:59.630 --> 00:24:11.770

Roshani Pandey: Yeah. So it looks like, you have, you know, in the previous slide was 14 weeks, 18 weeks. So it's more than 2 months. Right? So it's like for 14 weeks, for example. So a month only has 4 weeks. So that's like

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00:24:11.800 --> 00:24:13.249

Roshani Pandey: 2 months and a half

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00:24:14.930 --> 00:24:20.640

Roshani Pandey: like that. So you're it's not just April, May you're you're doing April, May, June. Probably a little bit of is that right?

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00:24:21.980 --> 00:24:24.700



John Bohnsack, CFP®: Correct. Correct. Yeah.

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00:24:24.850 --> 00:24:30.781

John Bohnsack, CFP®: And yeah, it's just all personal preference preference. The the reason I like it so much is

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00:24:31.240 --> 00:24:46.719

John Bohnsack, CFP®: I know when I'm off and I can build my safari trip to canyon, I think. Stephanie convinced me to do that now. But but yeah, you're right. It could extend longer than you know. Just April, May, or October, November.

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00:24:46.720 --> 00:24:47.400

Roshani Pandey: Okay.

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00:24:48.070 --> 00:24:48.850

Roshani Pandey: right?

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00:24:49.190 --> 00:25:17.630

Allison Foulk: I think it's good to look at your stop point. So at the end for example, searching in the latter half of the year. When do you want to be done, you know, is that by Halloween? You know, and then work backward. From that point I think it's something that's been helpful, as I've heard advisors talk about this and really building it in conjunction with, you know your personal schedule, and the time that is most important to you to not be in a search period.

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00:25:18.200 --> 00:25:24.130

John Bohnsack, CFP®: I I feel pretty strongly about being done before Thanksgiving for my surge. I don't know, Robbie, if you have the same.

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00:25:24.520 --> 00:25:30.779

John Bohnsack, CFP®: just giving 6 weeks before year year, and we like to take the last week of the year off. But yeah, for me, it's like, if I'm

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00:25:30.820 --> 00:25:35.719

John Bohnsack, CFP®: I'll do go through hell or high water and make sure that I'm done by Thanksgiving.

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00:25:36.180 --> 00:25:41.929

Robert Hansen, CFP®: Yep, I was gonna share my calendar today, just to show a little bit. Ours is Thanksgiving as well.

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00:25:44.430 --> 00:25:57.500

Allison Foulk: and we have a Rashani, we have examples of the model office calendar in the library. We put together 3 days a week, 4 days, or 4 meets a week, and 5 examples of those templates

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00:25:57.500 --> 00:26:14.459

Allison Foulk: in the library, so you can just pull up that template and see what? That, where that would put you in terms of the year, with a few holidays built in, and we built in the limitless events as well. So make sure you leave a week, so you can focus on doing your limitless work. In September, too.

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00:26:15.040 --> 00:26:15.900

Roshani Pandey: Thank you.

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00:26:16.190 --> 00:26:16.810

Allison Foulk: Yeah.

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00:26:17.050 --> 00:26:18.900

Allison Foulk: Okay, awesome.

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00:26:19.460 --> 00:26:22.220

Allison Foulk: Next, we have

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00:26:22.800 --> 00:26:51.190

Allison Foulk: a little bit about john's team. And John is gonna elaborate on the different roles everyone has. In the firm, and how they really come together to make this search process streamlined. So, John, I'll let you introduce everyone. And then following that, John and Robbie. Both are going to screen, share and go through what this really looks like in action. So John will do his portion of that after you. Intro everyone on your team, John.

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00:26:51.190 --> 00:27:02.609

John Bohnsack, CFP®: Oh, perfect. Yeah. So I'm lucky enough to have just a wonderful team assisting with our clients that we the privilege to serve. So I'm the lead advisor within this kind of I guess you could

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00:27:03.036 --> 00:27:13.939

John Bohnsack, CFP®: diamond team if if you will, if you've heard that concept before. And so Kate is. She's my associate advisor. Some people call it second chair

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00:27:14.225 --> 00:27:38.460

John Bohnsack, CFP®: it could be a parent planner. But she is doing all the heavy lifting regards to the meeting. Prep for for me. I kind of think of her. Let's keep with the safari analogy like we're going in a path, and she has a sword there, and she's kind of chopping all the branches and trees down as we go forward, so I can see a bigger picture of what's going on with the client. So a lot of the

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00:27:38.610 --> 00:27:53.260

John Bohnsack, CFP®: Abcs and 1, 2 threes of have they made their contributions yet? How? What's the return on the portfolio? What's the biggest concern she's taking care of, so I can look bigger and see if there's a bigger issue. You need to take care of spending.

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00:27:53.260 --> 00:28:22.675



John Bohnsack, CFP®: maybe some complex estate or tax planning idea. Everything there Kathy, is our heart and soul of our practice. She is the one who's driving our operations for all all of this, and her role is so important to make sure everything is done efficiently and getting taken care taken care of and getting everyone into our our process or process. And that's and that's part process. And I'll show what steps each of us have to do through our

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00:28:23.410 --> 00:28:25.869

John Bohnsack, CFP®: the workflow we've created for surge.

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00:28:31.780 --> 00:28:34.079

John Bohnsack, CFP®: Do you want me? Just go and show and tell right now.

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00:28:34.080 --> 00:28:35.210

Allison Foulk: Yes, let's jump.

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00:28:35.210 --> 00:28:35.680

John Bohnsack, CFP®: Okay.

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00:28:36.350 --> 00:28:38.939

Allison Foulk: Okay, hoping to take over John.

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00:28:39.120 --> 00:28:42.630

John Bohnsack, CFP®: Alright perfect. So let me share my screen. So there's

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00:28:42.790 --> 00:28:51.249

John Bohnsack, CFP®: particular 3 things I wanted to show. One is our workflow that we have in red tails. Most people know Adams are very big

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00:28:51.694 --> 00:29:04.050

John Bohnsack, CFP®: red tail crm, user. And so we built that all in there. So let me share my screen. Here I have an example for our client, Jonathan DOE. So grab

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00:29:08.000 --> 00:29:08.840

John Bohnsack, CFP®: there we go.

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00:29:12.100 --> 00:29:13.170

John Bohnsack, CFP®: all right.

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00:29:13.810 --> 00:29:15.549

John Bohnsack, CFP®: Alison, do you see my

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00:29:15.570 --> 00:29:18.409

John Bohnsack, CFP®: retail here? Okay, that's perfect.



209

00:29:18.810 --> 00:29:40.099

John Bohnsack, CFP®: So this is a sample workflow that we have set up, and then I'll go through all of the steps we have in here. The devils are the the devils in the details with surge. I know we talked about generally well how it works, but if you get the details right, it really makes a huge, huge difference. So I definitely want to go this within.

210

00:29:40.100 --> 00:30:04.689

John Bohnsack, CFP®: within detail. So on this workflow, this is the client has rescheduled the review meeting. So for us, our niche with optometrists work really well, because if you go to an optometry practice they typically pre schedule you for your next annual meeting. And so our niche actually understands that really well, I feel very lucky for working with that I know. Working with retirees

211

00:30:04.720 --> 00:30:16.385

John Bohnsack, CFP®: might be a little bit different than that, but we tried to schedule that ahead ahead of time, and so when that meeting is reviewed, then this workflow gets kick kicked off.

212

00:30:17.280 --> 00:30:36.211

John Bohnsack, CFP®: All this is taken care of by Kathy, the assigned to client service team. So she's taking the information from the scheduling activity from acuity and putting it in here. What times the meeting? How are we gonna meet? Any information that the client wants to make sure we

213

00:30:36.840 --> 00:30:45.211

John Bohnsack, CFP®: we discuss about and then moving for certain steps to certain dates before the meeting.

214

00:30:45.820 --> 00:31:04.679

John Bohnsack, CFP®: we do have a a templated agenda which I'll show it to you if the client mentions anything in their email to schedule. We'll make sure that's included in the agenda. They wanted to talk about 5 29 plans for their kids. They're thinking about applying for social security benefits. Are they on track for

215

00:31:05.010 --> 00:31:18.110

John Bohnsack, CFP®: retirement? She'll go ahead and add that. And then just a prep like a Thank you. Email, hey, we got you scheduled. Thanks for taking the time we have that saved in our text expander as a templated email.

216

00:31:19.360 --> 00:31:35.049

John Bohnsack, CFP®: So we got that, and then next is making sure our e-money is updated. So we use e-money to make sure that all the information is coming through for us. So are the links that are coming over. As you all know. If we use e-money, they don't work

217

00:31:35.330 --> 00:31:51.838

John Bohnsack, CFP®: 100% of the time. So are they updated. If they're not updated. I like Kathy to let me know. So I can get that information beforehand. So I can get an up to date network statement. If we needed any financial statements. Maybe a client who has a client who works



218

00:31:53.118 --> 00:31:59.750

John Bohnsack, CFP®: publicly traded company, and they have some Rsu's or any stocks like making sure we get documents on that.

219

00:31:59.770 --> 00:32:05.798

John Bohnsack, CFP®: on that. And then any reminders emails there, seeing if we need anything, follow up

220

00:32:06.210 --> 00:32:08.737

John Bohnsack, CFP®: needed needed there.

221

00:32:10.050 --> 00:32:23.550

John Bohnsack, CFP®: Next. Here we got any additional docs received. So that's following up. Did we receive those docs? If not, follow up with them, and then here prep. Any forms needed. So I might tell Kathy

222

00:32:23.560 --> 00:32:32.190

John Bohnsack, CFP®: we're going to do a backdoor, Roth Ira for this client. It's a home run, slam dunk. Whatever sport ball metaphor you want to use on that.

223

00:32:33.200 --> 00:32:57.989

John Bohnsack, CFP®: we're gonna do it. So let's go ahead and prepare the forms and send it to them ahead of time. So when they're there, they can just sign it, or some even some basic ones either set up journaling instructions, checking instructions just like the the ABC's 1, 2 threes of forms that as advisors, we we know we need to do changing beneficiary, changing beneficiary forms. So all that stuff is up on the front end and not on the back end, because we want to eliminate

224

00:32:58.100 --> 00:33:02.599

John Bohnsack, CFP®: as many things we can do in the back end, because it's going to get over overwhelming

225

00:33:03.690 --> 00:33:08.779

John Bohnsack, CFP®: here. And I need to get this actually should be updated with Kate

226

00:33:08.910 --> 00:33:20.260

John Bohnsack, CFP®: as a parent. So we're transitioning Kate from a parent planner associate advisor role to a full advisor role. But this is where Kate would be in. And this is where, if you have a pair planner, this is where they would step in.

227

00:33:20.260 --> 00:33:39.399

John Bohnsack, CFP®: So I would have Kate update the financial plan and e-money. So everything would be updated. The net worth statement would be updated, and I could review their financial plan, making sure everything's taken care of all their insurance information in there. Everything's taken care of, and then the next step is utilize this meeting checklist. So in



228

00:33:39.480 --> 00:34:03.089

John Bohnsack, CFP®: Red Tail, we try to keep it as simple as possible in regards to the steps. This meeting checklist is very extensive. So I actually have a separate file for that checklist. I'm a big believer in checklist. If you ever read the book checklist, manifesto that'll talk to you a lot about how important checklists are.

229

00:34:03.250 --> 00:34:04.100

John Bohnsack, CFP®: So.

230

00:34:04.100 --> 00:34:08.260

Allison Foulk: Do you mind? Do you mind just making your screen a little bit bigger.

231

00:34:08.260 --> 00:34:08.750

John Bohnsack, CFP®: Yeah.

232

00:34:09.239 --> 00:34:10.879

Allison Foulk: Awesome. Thank you.

233

00:34:11.020 --> 00:34:11.920

John Bohnsack, CFP®: Is that better?

234

00:34:12.110 --> 00:34:13.520

Allison Foulk: Yeah, that looks great. Thanks.

235

00:34:13.520 --> 00:34:32.240

John Bohnsack, CFP®: Perfect. So this is my review meeting checklist. I'm assuming each of you have a checklist similar to to this. But this is a way that I can communicate to my parent plan or my associate advisor. What my expectations are that they check in preparation for the in preparation for the meeting.

236

00:34:32.370 --> 00:34:33.460

John Bohnsack, CFP®: So

237

00:34:33.690 --> 00:34:42.389

John Bohnsack, CFP®: on. Here I call this our foundations like, why are we meeting like? Why are we asking our client to spend an hour of time with us.

238

00:34:42.400 --> 00:35:09.730

John Bohnsack, CFP®: And what are we trying to solve for? And is there any measure of progress we can share? A client getting past the 1 million dollar net worth statement, their portfolio getting to 5 million dollars any wins there that can kind of start the meeting with a warm, warm, fuzzy, obviously reading previous notes looking what's in Red Tail. If there's anything we need to add to the agenda agenda items from the previous meetings that we didn't get to, and that we can add.



239

00:35:09.830 --> 00:35:33.779

John Bohnsack, CFP®: add, add to it. Obviously, you guys know, we're have a niche in optometrists. So we do have some practice management thing. This is unique to our niche. And I know many of you have niches as well. So here I would be adding things regarding that niche that makes your service unique for us. It's the reviewing the Big 3 financial statements for a small business owner.

240

00:35:34.285 --> 00:35:41.215

John Bohnsack, CFP®: We added this recently of debt management with the interest rates going from historical lows to going up

241

00:35:42.020 --> 00:35:52.040

John Bohnsack, CFP®: to 5, 6, 7%. You probably noticed you had some clients who've been making extra payments on loans that were at 2%, and then having new loans at 7%

242

00:35:52.140 --> 00:35:58.609

John Bohnsack, CFP®: and not making extra payments on that. So we've been reordering that that's been a common theme that we've seen with our

243

00:35:58.989 --> 00:36:05.070

John Bohnsack, CFP®: clients doing the right thing, trying to pay down debt, just picking the right, the wrong debt to pay pay down.

244

00:36:06.116 --> 00:36:08.180

John Bohnsack, CFP®: I have investments here.

245

00:36:08.580 --> 00:36:18.480

John Bohnsack, CFP®: some data marks that I like to to see, and I don't like to show the clients that, but making sure that the portfolio is well taken care of.

246

00:36:18.700 --> 00:36:26.360

John Bohnsack, CFP®: Some more administrative small things here, like making sure we can move money the way we need to move money for the client

247

00:36:26.610 --> 00:36:51.019

John Bohnsack, CFP®: any tax planning, and this could be a whole presentation on itself. Making sure that's reviewed making sure that your State's taken care of insurance needs. And then we also have age related items. So I'd like to have my payroll planner check what age the client is if they're turning 72. That means R&D's are coming up. Obviously, if they're turning 62, a lot of them want to take social security.

248

00:36:51.348 --> 00:37:01.200

John Bohnsack, CFP®: So talking to them about that. If their kids are turning 18, if we have power attorney documents, they're taken care of. So those are age related. And then

249



00:37:01.210 --> 00:37:09.670

John Bohnsack, CFP®: last thing is opportunities, looking at the balance sheet to see if there's any opportunities in lazy cash that needs to be deployed in their plan.

250

00:37:09.670 --> 00:37:34.440

John Bohnsack, CFP®: Look at outside investment and management assets for us to manage. And then we started using Pontera to do some management of 4. 1 k. Plan. So this is the how Kate prepares that agenda for me, and if I know she's got done this taken care of, she's taken like I said, like the sword, the machete, and gone through the past, so I can look at a bigger, bigger view to see if there's anything that I need to address

251

00:37:34.742 --> 00:37:40.497

John Bohnsack, CFP®: with clients, and I'd be glad to share that checklist with anyone who is interested in that as well.

252

00:37:42.240 --> 00:38:06.025

John Bohnsack, CFP®: I think I got a little more time left before I go. Yeah. So I review everything. And then we actually have the meeting. It's important to dictate your notes as quickly as possible after that meeting, because they're gonna all blend together, especially if you're doing 5 or 6 meetings a day. So getting that taken care of. And then I really depend on my team, Kathy and Kate to

253

00:38:06.420 --> 00:38:19.219

John Bohnsack, CFP®: add tasks for their clients and putting our action items in our Crm. At a time period that makes sense for me to get back to them. So they're making the discretionary decision, the professional decision of

254

00:38:20.080 --> 00:38:33.390

John Bohnsack, CFP®: what I said in the meeting about getting back to a client and then assigning the task for that proper, right, correct, correct time, and then on the back end. Here we have, you know, putting the information in reviewing the notes.

255

00:38:33.400 --> 00:38:35.240

John Bohnsack, CFP®: Did. We schedule the next

256

00:38:35.727 --> 00:38:49.869

John Bohnsack, CFP®: meetings. We can kick off the next floor for a next our next one, and then here we have some step close in case the clients don't show up, it's very rare that I don't have a client show up for surge. I probably had

257

00:38:50.940 --> 00:38:52.680

John Bohnsack, CFP®: one.

258

00:38:53.260 --> 00:38:55.839

John Bohnsack, CFP®: The 3 no shows for surge

259



00:38:56.130 --> 00:39:07.520

John Bohnsack, CFP®: which surprises me. But, we have a really good acceptance rate on our, on our, on our surges. Let me show the example, agenda that we

260

00:39:07.920 --> 00:39:09.350

John Bohnsack, CFP®: use.

261

00:39:10.700 --> 00:39:13.070

John Bohnsack, CFP®: Alison. Do I need to increase the size of this here.

262

00:39:13.540 --> 00:39:15.199

Allison Foulk: Yeah, that would be great. Thank you.

263

00:39:15.200 --> 00:39:21.609

John Bohnsack, CFP®: Okay, so this is a real agenda that I use for a client here in February.

264

00:39:21.700 --> 00:39:22.840

John Bohnsack, CFP®: So

265

00:39:25.060 --> 00:39:28.629

John Bohnsack, CFP®: I have every area of financial planning on it.

266

00:39:28.980 --> 00:39:35.020

John Bohnsack, CFP®: And then I have Kate add notes to it. Okay, we got the burst. We got their tax return on file.

267

00:39:35.360 --> 00:39:58.729

John Bohnsack, CFP®: This is unique to our niche. That's a low salary in which an optometrist should be making. So I wanted to talk to Robert about these aren't the real names, but I wanted to talk to Robert about a salary, and it should actually been doubled for several reasons. Investments did we complete their backdoor? Roth contributions? Are they maxing their 400 oneks.

268

00:40:00.640 --> 00:40:03.030

John Bohnsack, CFP®: what the rebalance is here.

269

00:40:03.330 --> 00:40:04.729

John Bohnsack, CFP®: Cash flow

270

00:40:05.110 --> 00:40:05.870

John Bohnsack, CFP®: like

271

00:40:06.120 --> 00:40:11.549

John Bohnsack, CFP®: big win. They paid off their mortgage. What we're going to do with the extra



cash flow going forward there.

272

00:40:11.860 --> 00:40:14.870

John Bohnsack, CFP®: Insurance risk management estates.

273

00:40:15.200 --> 00:40:17.529

John Bohnsack, CFP®: you know other goals

274

00:40:17.560 --> 00:40:21.509

John Bohnsack, CFP®: reviewing the operating agreement here, and then

275

00:40:21.940 --> 00:40:35.050

John Bohnsack, CFP®: Alex concerns. They changed their retirement goal of 55. We were talking about 60. So now they were talking about 55. So we want to make sure we address that in the in the meeting. I'll get it like this, and then

276

00:40:35.050 --> 00:40:55.066

John Bohnsack, CFP®: what I will do is I'll prioritize what I want to talk about in order like. In some cases clients will gladly go through your agenda in order. Some of them will just pick a topic, and then you just go from go from there. But this is how kind of I I think about it. If a client had any additional items like last minute items, they're like, Oh, I want to talk about gifting

277

00:40:55.490 --> 00:41:01.839

John Bohnsack, CFP®: Disney shares to my niece or something here that'll be on there and cause they'll event

278

00:41:02.040 --> 00:41:27.200

John Bohnsack, CFP®: guarantee about 2030% of your clients will email you the day of, or the day before, with one more item that they want to add to it. If it's too complex that they want, like a full review of their state documents or a full retirement projection. I just I'm just not going to meet that. So I'll set expectations that will cover that at a different time during the meeting. But if it's something small, you know I've

279

00:41:27.200 --> 00:41:35.075

John Bohnsack, CFP®: someone told me about a donor advised fund. Can you explain to me what that is, I'll include that in the agenda as as well.

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00:41:37.930 --> 00:41:39.230

John Bohnsack, CFP®: yeah, any.

281

00:41:40.930 --> 00:41:44.539

John Bohnsack, CFP®: I got some further thoughts, but I'll cover that later in the meeting. That's

282

00:41:44.690 --> 00:41:51.279



John Bohnsack, CFP®: kind of my deliverables. I have any questions. Sorry I was looking at the screen yard. Maybe there's some questions that came in. I didn't see them.

283

00:41:52.680 --> 00:41:57.870

Allison Foulk: Yes, we have one from Steven. How many relationships are you responsible for John.

284

00:41:57.870 --> 00:42:03.660

John Bohnsack, CFP®: I'm at 78 right now, and I've stopped taking on clients.

285

00:42:04.114 --> 00:42:10.049

John Bohnsack, CFP®: So my scheduling is unique. From what I started with, because I started with.

286

00:42:10.320 --> 00:42:21.857

John Bohnsack, CFP®: Oh, gosh! I started with 50 clients. So at that time I was doing search and onboarding at the same time. And now it's 78 with my book pretty much full.

287

00:42:22.370 --> 00:42:32.802

John Bohnsack, CFP®: I'll take on some new clients if they're a right fit from a revenue standpoint and a personality standpoint. But I'm not doing them during surge they're coming in

288

00:42:33.350 --> 00:42:43.099

John Bohnsack, CFP®: They're coming in after surge, and I'm doing a separate time for for them. I know I'll miss out some clients for that. But that that's okay. I just

289

00:42:43.470 --> 00:42:45.610

John Bohnsack, CFP®: it's just kind of the nature of the business.

290

00:42:47.090 --> 00:42:59.770

Allison Foulk: Okay? A few requests to share the checklist, which I think John is planning on doing. Rashani is wondering how many days before the meeting. Do you share the agenda with the client?

291

00:43:00.305 --> 00:43:08.409

John Bohnsack, CFP®: I actually don't share the meeting agenda with the clients. I know a lot of advisors do that. But

292

00:43:08.590 --> 00:43:24.180

John Bohnsack, CFP®: yeah, we haven't shared the meeting agenda, the client and I I haven't got any pushback or feedback on on that, so I might argue in my experience. That's an extra step that's not needed. But I know other practices who really strongly believe on that makes it makes their meetings more efficient.

293

00:43:25.320 --> 00:43:26.210

John Bohnsack, CFP®: Thanks.



294

00:43:26.662 --> 00:43:33.449

Allison Foulk: And let's see. So Jen, similar question, what is included in the pre meeting email.

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00:43:34.913 --> 00:43:36.520

John Bohnsack, CFP®: Just a

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00:43:36.620 --> 00:43:45.269

John Bohnsack, CFP®: a templated agenda like a templated agenda. Just really, really basic. Like, like, just we're gonna cover tax cash flow.

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00:43:45.340 --> 00:43:56.019

John Bohnsack, CFP®: Yeah, very boilerplate and just a reminder what the date and time we're meeting and how we're meeting, whether it's phone call or or zoom. I don't meet anyone face to face face. I've only actually met

298

00:43:56.610 --> 00:44:01.777

John Bohnsack, CFP®: 4 or 5 of my clients face to face. Given our practice and our niche.

299

00:44:02.550 --> 00:44:13.079

John Bohnsack, CFP®: yeah. So just explaining how we're how we're going to meet meet there. Really really simple. Just more of a reminder to make sure they show up for the the meeting. I think that's part of why we have

300

00:44:13.890 --> 00:44:16.169

John Bohnsack, CFP®: rarely have any. No shows for the meeting.

301

00:44:17.190 --> 00:44:22.359

Allison Foulk: Okay? And how many days before the meeting do you ask the client for their agenda.

302

00:44:24.051 --> 00:44:26.418

John Bohnsack, CFP®: In the process. Here.

303

00:44:29.410 --> 00:44:31.080

John Bohnsack, CFP®: let me check here.

304

00:44:36.550 --> 00:44:39.450

John Bohnsack, CFP®: Yeah. It'd be a week a week before the meeting.

305

00:44:40.210 --> 00:44:41.216

Allison Foulk: Okay. Great.

306

00:44:42.540 --> 00:44:49.259



Allison Foulk: Alright any further questions, for John feel free to unmute? If so.

307

00:44:52.330 --> 00:44:53.230

Allison Foulk: okay.

308

00:44:53.500 --> 00:44:54.130

Allison Foulk: great.

309

00:44:54.130 --> 00:45:08.620

Marianne Martini Nolte, CFP®: I've got a question. So is anybody using like a a slide show in the background during their meeting? That helps to drive the agenda

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00:45:09.900 --> 00:45:11.279

Marianne Martini Nolte, CFP®: for lack of better words.

311

00:45:12.580 --> 00:45:16.139

John Bohnsack, CFP®: So are you saying like a visual behind me like I, you know, I could do a

312

00:45:16.640 --> 00:45:20.719

John Bohnsack, CFP®: instead of my office. I could do like a screen of like the upcoming agenda.

313

00:45:21.100 --> 00:45:24.059

Marianne Martini Nolte, CFP®: Yeah, exactly. You know. Also that.

314

00:45:24.543 --> 00:45:25.229

Marianne Martini Nolte, CFP®: Go ahead.

315

00:45:25.230 --> 00:45:43.394

John Bohnsack, CFP®: I've thought about it. I know. I know there's some technology like, you know, at the news where you have just the square behind you, and then you have the background like I've thought about that a little a little bit, but I haven't. I haven't gone gone there. I do use drawing quite a bit, you know I have my whiteboard right behind me.

316

00:45:43.910 --> 00:45:57.120

John Bohnsack, CFP®: Cause I know a lot of advisors set up some kind of deliverable or custom report. I try to stay as far away from that as possible because of the surge process. It's just one more custom thing that we have to do, and I find out I can, if I can, draw it like.

317

00:45:57.180 --> 00:45:58.070

John Bohnsack, CFP®: you know.

318

00:45:58.360 --> 00:46:17.200

John Bohnsack, CFP®: draw it on my whiteboard instead of creating us an excel file for it that that works



really well for for clients it's just one step I'm trying to take away from preparing for for clients. When I was in the more traditional for my practice room. We do customize reports, for almost, you know, 30, 40% of my clients. And it was just a

319

00:46:17.210 --> 00:46:27.079

John Bohnsack, CFP®: it was just a time drag, and I didn't really find the clients really made a huge difference for them. So I'm bigger into drawing on my whiteboard and using that.

320

00:46:27.450 --> 00:46:35.540

Marianne Martini Nolte, CFP®: That that makes sense, John. Just streamline it upfront and get rid of the bells and whistles so that you're efficient. Okay, thank you so much.

321

00:46:35.540 --> 00:46:36.180

John Bohnsack, CFP®: Yep.

322

00:46:37.150 --> 00:46:41.410

Steven Fronrath: Hey, John, real quick! How many, how many client relationships are you? Are you managing.

323

00:46:42.020 --> 00:46:55.370

John Bohnsack, CFP®: So I'm at 78 right right now, and I'll top. I'll probably top off at 80, and then that's just a personal preference for me. I think I could scale to a hundred. I just

324

00:46:55.560 --> 00:47:00.260

John Bohnsack, CFP®: I just don't want to.

325

00:47:02.350 --> 00:47:03.559

Steven Fronrath: Makes sense thanks.

326

00:47:03.560 --> 00:47:04.170

John Bohnsack, CFP®: Yup!

327

00:47:05.540 --> 00:47:08.800

Allison Foulk: Okay. Any other questions for John.

328

00:47:10.580 --> 00:47:12.070

Allison Foulk: Okay.

329

00:47:12.260 --> 00:47:22.315

Ian Rea: Just one quick one just in terms of getting the stuff you need from the clients ahead of time, whether that's insurance information or getting them to update their

330

00:47:22.840 --> 00:47:40.100



Ian Rea: you know, e-money stuff, or you know what all the pieces that you need to be able to do the plan. At least, I personally have a lot of trouble getting people to engage when it comes to getting all the prep work done. So I'm just wondering how what you do to make sure that actually happens.

331

00:47:40.100 --> 00:47:47.600

John Bohnsack, CFP®: Yeah, one is just using technology right? Like using e-money. And so you don't have to grab so many of those state statements.

332

00:47:47.640 --> 00:48:09.579

John Bohnsack, CFP®: 2 is following up. I mean, we'll do a like. We'll do an email. And I'll do a phone call with them. And if they, if they don't want to send me that information or don't find it important. I'm not. Gonna I'm not gonna follow up with them on that. It's just recognizing you're not going to get all the information from your from your client, and then just doing the best you can with the information you have during during during during during during the meeting.

333

00:48:11.590 --> 00:48:17.620

John Bohnsack, CFP®: so it's it's just meeting where the clients where they're at. And then by and then talking to them about an easier process in the meeting about.

334

00:48:17.660 --> 00:48:20.779

John Bohnsack, CFP®: how can we help you get that that data to

335

00:48:20.870 --> 00:48:30.390

John Bohnsack, CFP®: to us and make it easier for you, and just being honest with them is like I can't. If you can't give me this information, I can't do my best best work, and just being the client work

336

00:48:30.710 --> 00:48:34.770

John Bohnsack, CFP®: where where it is. So I just, I guess I just kind of look at as a more.

337

00:48:35.170 --> 00:48:40.650

John Bohnsack, CFP®: a realistic view that we're just not going to get everything we have to do the best of what we what we got.

338

00:48:41.670 --> 00:48:52.410

Ian Rea: Okay, thanks. Yeah, that's helpful. Because I was sort of looking at the checklist. It was sort of I was imagining you just were had everything you possibly needed going into that to be able to check all that stuff off, and that's.

339

00:48:52.410 --> 00:48:53.350

John Bohnsack, CFP®: No, we'll use the.

340

00:48:53.350 --> 00:48:53.860

Ian Rea: I never.

341



00:48:53.860 --> 00:48:54.220
John Bohnsack, CFP®: The most.

342
00:48:54.220 --> 00:48:54.826
Ian Rea: Get there!

343
00:48:55.130 --> 00:49:07.490
John Bohnsack, CFP®: Yeah, we'll use the most most recent statement or the data that we that we have. Maybe we'll change it on the on the fly. But with this the surge process, and what you're what you're doing. If the client's not gonna

344
00:49:07.650 --> 00:49:20.419
John Bohnsack, CFP®: participate in that, you just do with the best, would you have and move and move, move forward. And I don't think that really changes, even if you had a you know the quote unquote typical advisor experience, too, because you're still gonna have those clients who aren't. Gonna

345
00:49:21.310 --> 00:49:24.390
John Bohnsack, CFP®: they're just not going to get you that that information. It's just not who they

346
00:49:24.770 --> 00:49:25.810
John Bohnsack, CFP®: but they are.

347
00:49:26.050 --> 00:49:28.239
John Bohnsack, CFP®: Yeah, we all have clients like that. So.

348
00:49:28.240 --> 00:49:29.160
Ian Rea: Yeah, thanks.

349
00:49:29.490 --> 00:49:30.549
Ian Rea: Makes a lot of sense.

350
00:49:31.040 --> 00:49:51.509
Matthew Benson: Hey, John, I got a question on. Thanks for sharing all this stuff. By the way. On the review meeting checklist. That excel sheet. Is Kate or someone else? Are they going through and manually like pulling and updating that each time? Or are you able to export some of that somehow?

351
00:49:51.880 --> 00:50:09.530
John Bohnsack, CFP®: Yeah. So it depends. So if Kate was a new hire, or maybe the 1st time going through it, I would probably ask her to print it off and kind of hand check it through, and then we would go through that. So more of a training guide where Kate is right now

352
00:50:10.450 --> 00:50:16.059
John Bohnsack, CFP®: I have complete confidence in her, and so I just ask her to use it as a reference



353

00:50:16.310 --> 00:50:22.070

John Bohnsack, CFP®: as a reference sheet to make sure she didn't forget everything. She's done enough of these that she has it pretty she has.

354

00:50:22.570 --> 00:50:41.019

John Bohnsack, CFP®: I bet she hasn't memorized by now. And so that's kind of how I've I've used it, you know, before I in a physical office. We're all virtual, you know. I've gone to the process like carrying that piece of paper around the office to do it. I in practice

355

00:50:41.110 --> 00:50:54.769

John Bohnsack, CFP®: it sounds nice, but practically I think it's really hard to do. But yeah, I the beginning like I said I would have her printed off. Check, check it out, use it, and then, as she gets more experience, it's just there as a as a got

356

00:50:54.850 --> 00:50:56.440

John Bohnsack, CFP®: as as a guide.

357

00:50:56.760 --> 00:51:10.200

Matthew Benson: So then you're not. You're not review. The review meeting checklist is not for you to review before it's for someone else. So before a meeting. You're reviewing the previous meeting notes the agenda. What else.

358

00:51:10.930 --> 00:51:13.310

John Bohnsack, CFP®: Yeah, meeting notes, agenda

359

00:51:13.730 --> 00:51:17.429

John Bohnsack, CFP®: agenda. And then I'm just trying to think of anything.

360

00:51:17.859 --> 00:51:25.079

John Bohnsack, CFP®: That would be particularly helpful for that client that maybe just got missed on the agenda, so I can think a little bit like I said a little bit

361

00:51:25.400 --> 00:51:32.300

John Bohnsack, CFP®: a little bit bit bigger on that on that single. Oh, actually, this strategy would work really good for

362

00:51:32.800 --> 00:51:41.039

John Bohnsack, CFP®: donor advise donor, advised fund, or something like something like that. Yeah, I'm just reading previous meeting notes and the agenda, and I'm trusting that Kate got it all

363

00:51:41.160 --> 00:51:46.749

John Bohnsack, CFP®: all covered because I at the surge you don't have. I don't have the time to do

364



00:51:46.890 --> 00:51:48.099
John Bohnsack, CFP®: to do that.

365
00:51:48.100 --> 00:51:48.440
Matthew Benson: Yep.

366
00:51:48.440 --> 00:51:50.110
John Bohnsack, CFP®: But I need to depend on her

367
00:51:50.806 --> 00:51:52.190
John Bohnsack, CFP®: to get that done.

368
00:51:53.020 --> 00:51:53.850
Matthew Benson: Well, thank you.

369
00:51:57.140 --> 00:51:57.790
Allison Foulk: Okay.

370
00:51:57.970 --> 00:51:59.760
Allison Foulk: Fabulous. Thank you, John.

371
00:51:59.760 --> 00:52:00.560
John Bohnsack, CFP®: Yep.

372
00:52:00.740 --> 00:52:03.180
Allison Foulk: Next up we have

373
00:52:03.850 --> 00:52:05.060
Allison Foulk: Robbie.

374
00:52:05.760 --> 00:52:13.169
Allison Foulk: Alright, Robby, can you take us through your team here, and then we'll transition to you, showing and telling as well.

375
00:52:13.670 --> 00:52:14.550
Robert Hansen, CFP®: Perfect.

376
00:52:14.918 --> 00:52:36.240
Robert Hansen, CFP®: So again I'm Robbie Hanson. If you can see similar last name, Chris Hansen. My dad started the firm. I've been with him for about 8 years now, and we've grown over the last handful of years of adding Ben and Trey on the team. Sharon's been a part of the team as a little over half time client service role.



377

00:52:36.573 --> 00:53:00.570

Robert Hansen, CFP®: But we are growing. It's it's been a really fun ride. It's just a little chaotic sometimes. So I was really excited to join this conversation. Because, John, I knew with you and Adam, and how you guys work that you would have these amazing workflows and have everything systematized. And it's so fun to see that end of it, because ours is definitely a bit more chaotic not as

378

00:53:00.570 --> 00:53:13.220

Robert Hansen, CFP®: efficient, but still shows that you can just get stuff done sometimes with Google docs. So keeping it simple sometimes works, too. But yeah, I can't wait to get to the point you just showed John. But

379

00:53:13.220 --> 00:53:32.279

Robert Hansen, CFP®: yeah, our team. It's it's hopefully, gonna have 2 more advisors by the end of this year. Actually, ben on our team is our director of financial planning. And what we mean by that is, he's actually prepping most of the planning for all of our surge meetings. I'm not involved in any of the meeting. Prep.

380

00:53:32.280 --> 00:53:43.659

Robert Hansen, CFP®: Because I'm involved in running all of the meetings, and I'm kind of taking care of all of our growth. So because of that, I just don't have time to prep the meetings. I just need to make sure I can trust what they put together.

381

00:53:43.660 --> 00:54:02.867

Robert Hansen, CFP®: what we're going to deliver. I fully understand it, and I communicate it to the client they is in that associate advisor position, and he's taking a lot of notes. We're also getting him comfortable with leading and delivering some of the meetings and recommendations as we're hiring onto more advisors to backfill him.

382

00:54:03.240 --> 00:54:19.910

Robert Hansen, CFP®: and Sharon is really helping out with everything operations and client service side. So the way we are set up is because we needed to get my dad out of client meetings. It's just something he's great at. His clients. Love him, but really is just not the

383

00:54:20.000 --> 00:54:21.950

Robert Hansen, CFP®: right seat for him.

384

00:54:22.296 --> 00:54:29.360

Robert Hansen, CFP®: Super draining. So I'd say, I'm in about 98% of the meetings, and he's maybe in 10 to 15%.

385

00:54:36.860 --> 00:55:04.100

Robert Hansen, CFP®: I guess before I share my screen, too. I did want to mention. We have over 200 households we're working with, and a little different. The way we're set up is, we kind of manage all of the households as a team, and that is changing slightly because of how fast we're growing. We're brought on about 45 new clients last year about 40 the year before that. So it's really been growing fast, as we've kind of kicked things off already on pace to hit that again this year. So



386

00:55:04.406 --> 00:55:17.599

Robert Hansen, CFP®: we have about 125 that I say, really fit into our search process. And I'm involved in again every single one of those meetings, unless we just double book and got to kind of break it out between the team.

387

00:55:21.970 --> 00:55:24.160

Allison Foulk: Okay. Great thanks. Robbie.

388

00:55:24.550 --> 00:55:25.230

Robert Hansen, CFP®: Yeah.

389

00:55:25.230 --> 00:55:27.989

Allison Foulk: Right. We'll let you share your screen. Here.

390

00:55:29.140 --> 00:55:30.770

Robert Hansen, CFP®: I wanted to

391

00:55:31.180 --> 00:55:35.189

Robert Hansen, CFP®: kind of take a step back and talk about the

392

00:55:35.320 --> 00:55:49.649

Robert Hansen, CFP®: our, our calendar for surges a bit because it has changed so significantly. And actually, it's changed a little bit because of John and Adam and advice they gave. So

393

00:55:49.820 --> 00:55:54.149

Robert Hansen, CFP®: again, we work with physicians, and that is our niche. So we

394

00:55:54.380 --> 00:56:17.129

Robert Hansen, CFP®: kind of identified as we've been doing this the last 8 years specifically with physicians. What planning, really, we should focus on with them what is most urgent, and we should fit into surges. So we are more available outside of surges. If something pops up that's urgent that they need help with. It's inevitable. We're gonna have some of those meetings outside of surges. But with everything

395

00:56:17.540 --> 00:56:29.260

Robert Hansen, CFP®: with adapting and adopting the search process, we have really limited the amount of meetings outside of service which has been extremely helpful. It gets us to really focus just on growth

396

00:56:29.290 --> 00:56:46.570

Robert Hansen, CFP®: systematizing everything in the company building up the team all that kind of stuff. So the thing I kind of wanted to emphasize here is this is our 2025 calendar kind of looking ahead, and I do have just a few different color codings on here. But



397

00:56:46.590 --> 00:56:51.330

Robert Hansen, CFP®: some of the things I want to point out is we broke out into 2 main surges.

398

00:56:51.490 --> 00:56:52.600

Robert Hansen, CFP®: So

399

00:56:52.620 --> 00:57:02.549

Robert Hansen, CFP®: little bit of May most all of June, and a little bit of July is our tax planning surge, and then we have a major financial independence end of year surge from September and October.

400

00:57:02.750 --> 00:57:04.990

Robert Hansen, CFP®: It's outside of that that we did

401

00:57:05.360 --> 00:57:11.740

Robert Hansen, CFP®: add, because of John and Adam, a goal planning surge early on in the year. This was the 1st year we did that.

402

00:57:11.800 --> 00:57:12.930

Robert Hansen, CFP®: So

403

00:57:13.500 --> 00:57:19.034

Robert Hansen, CFP®: kind of laying out our service calendar. It really is like, let's kick off the year with

404

00:57:19.370 --> 00:57:36.780

Robert Hansen, CFP®: a 30 to 45 min search process meeting of goal planning what we want to get done throughout the year. What we want to focus on, what goals they have, how we can keep them accountable and laying out. Is there anything this year that's coming up, that we should be aware of and maybe earmark. We need to get back together for this.

405

00:57:36.850 --> 00:57:39.740

Robert Hansen, CFP®: It really really helps with

406

00:57:39.750 --> 00:57:51.370

Robert Hansen, CFP®: making sure outside of surges. Are we going to meet with that person or not. Possibly. It's kind of reduces the amount of surprises we have and clients loved it.

407

00:57:51.420 --> 00:58:00.629

Robert Hansen, CFP®: It was one of the big things on. This is our 2024 calendar this year, and a little bit of 2023, I would say. Most of the year we were surging.

408

00:58:00.680 --> 00:58:14.299

Robert Hansen, CFP®: and one of the issues, especially in 2,022. We started doing. This was we were



trying to do the financial independence surge at the beginning of the year, and you can kind of see this off green color where we're also trying to do tax prep.

409

00:58:14.450 --> 00:58:31.840

Robert Hansen, CFP®: And we knew our clients wanted to meet at the beginning of the year. They wanted to kick things off. And unfortunately, not a lot of people respect tax preparation, they say, Oh, yeah, that's getting done. But that's not a meeting. Where's the work? And they want to get together and focus on these things. So we're trying to do 2 of the biggest

410

00:58:31.840 --> 00:58:52.160

Robert Hansen, CFP®: data, gathering conversations of the year all at once, and it was a nightmare. It just did not work. It led to meetings, being throughout the full year on this stuff, people missing part of that surge and just having that conversation with Adam at one of the conferences. Was I just kick it off with a simple goal planning meeting, not a ton of prep. It's just a conversation.

411

00:58:52.160 --> 00:59:12.159

Robert Hansen, CFP®: It put all of our clients at ease. Everyone was perfect with, yeah, let's just do the financial planning or the financial independence late year surge in September, October instead. And yeah, it just resonated super. Well. So it shows that even after a few years of doing this, there's always room to adapt and grow but again, with physicians

412

00:59:12.430 --> 00:59:23.229

Robert Hansen, CFP®: tax planning huge for us, which is why it's its own surge. And then just reviewing the plan at the end of the year these other colors, we call them surges because tax prep.

413

00:59:23.270 --> 00:59:27.730

Robert Hansen, CFP®: It's not client meetings for a surge, but it is surging some of our work.

414

00:59:27.790 --> 00:59:35.999

Robert Hansen, CFP®: So a whole lot of tax prep early on in the year. And then we do a lot with company benefits and review near the end of the year which we try to handle all those

415

00:59:36.210 --> 00:59:41.229

Robert Hansen, CFP®: just through email phone calls or loom video sending it back and forth. So no meetings.

416

00:59:42.280 --> 00:59:46.760

Robert Hansen, CFP®: But yeah, the the calendar has changed a lot as we've done this each year. But

417

00:59:46.820 --> 00:59:50.390

Robert Hansen, CFP®: we're finally getting in that rhythm where we can take more time off. And

418

00:59:50.430 --> 00:59:53.890

Robert Hansen, CFP®: these days don't turn into one of these other colors.



419

00:59:58.660 --> 00:59:59.940

Robert Hansen, CFP®: so

420

01:00:00.900 --> 01:00:12.189

Robert Hansen, CFP®: kinda also on this we do have. It's Tuesday, Wednesday, Thursday is just like the process is normally set up. We are doing 6 meetings a day roughly, and

421

01:00:12.430 --> 01:00:17.690

Robert Hansen, CFP®: some of the things that I found super helpful as we got into this were.

422

01:00:17.920 --> 01:00:32.089

Robert Hansen, CFP®: if you're doing all Tuesday, Wednesday, Thursdays, we don't do late meetings on Wednesdays gives us one evening in the week that we can kind of relax, super helpful, and we always block off the week before surge starts

423

01:00:32.240 --> 01:00:42.890

Robert Hansen, CFP®: the week right in the middle and the week after, and we don't let any meetings growth prospect calls anything during those weeks, so we can really

424

01:00:44.060 --> 01:00:57.669

Robert Hansen, CFP®: finish up any preparation, anything. We gotta get done kind of relax before it starts. Try to catch up and get organized halfway through and really close out the entire surge and make sure it's good to go by that last week.

425

01:00:58.815 --> 01:00:59.370

Robert Hansen, CFP®: So

426

01:01:01.690 --> 01:01:05.939

Robert Hansen, CFP®: Other than that, I think that's it on the calendar. Let me

427

01:01:06.760 --> 01:01:09.789

Robert Hansen, CFP®: pivot a little bit to.

428

01:01:10.900 --> 01:01:31.279

Robert Hansen, CFP®: I was gonna share some of our tech stack. I know, sitting in some of these conversations. It's tough sometimes, because, you see. Well, I can't do any of that, because I don't use that. Crm, that planning software or something like that. But I did want to kind of point out a few things that we get really excited about. We're nerds. We love technology and software. So

429

01:01:31.594 --> 01:01:56.155

Robert Hansen, CFP®: definitely wanted to point these out. And you can see like fireflies is, I thought, a part of today's conversation. All tools have been incredible, and I'll kind of bring these up as we go. But we do use salesforce the accelerate package for our Crm. And really cause we knew we could customize and build out some of the ways. We're using Google drive for our documents. Our note taking all that



kind of stuff.

430

01:01:56.987 --> 01:02:15.799

Robert Hansen, CFP®: Loom has changed our company for preparing for meetings, putting together the summaries, everything sending videos to clients training for employees, just absolutely incredible for videos. And again, some of the AI tools, I'll show. And then we use calendar for scheduling.

431

01:02:17.050 --> 01:02:19.189

Robert Hansen, CFP®: and then from there.

432

01:02:19.410 --> 01:02:34.129

Robert Hansen, CFP®: So we do. Similar to to John and Adam. We have with salesforce the Crm. All these reports built out where we can really organize. Who's a part of this surge and who is going to be invited? And we actually

433

01:02:34.130 --> 01:02:55.149

Robert Hansen, CFP®: kind of going back to the main surge process. Those 1st 2 steps, which is the 1st one is scheduling, second, one is preparing. We did in the last year. Switch those. So 1st one is preparing. Second, one is scheduling because we found it helped. Just kind of keep things calmer where we're not trying to. If I almost felt like

434

01:02:55.520 --> 01:03:12.779

Robert Hansen, CFP®: we're scheduling, trying to get all the work done. But what we can't get done and what meetings pop up in between. We're trying to work on pivot and go throughout the surge. And it kind of makes it a bit chaotic. So we've really focused on, we're going to do all the work for everyone

435

01:03:12.800 --> 01:03:19.090

Robert Hansen, CFP®: before the surge even starts. So that's why we do have these windows over here where it's just

436

01:03:19.330 --> 01:03:27.140

Robert Hansen, CFP®: no surge meetings trying to really focus on just getting everything prepared minus growth that I'm taking care of on the team.

437

01:03:28.590 --> 01:03:42.619

Robert Hansen, CFP®: but that's why loom videos are so helpful as well. We actually have. So we can generate the report of who's in the meetings? Who's going to be invited to the surge? Who we want to do the work for? We can then

438

01:03:42.750 --> 01:04:05.580

Robert Hansen, CFP®: automatically create the 125 note templates that I'll show in a minute, and we can start to just build out every single one. And as they get built out by the team. That's our financial planning team. They are putting together loom videos, 5 to 10 min videos of a summary of everything in the notes so that way we can quickly watch it stay on top of it. And

439



01:04:05.720 --> 01:04:14.619

Robert Hansen, CFP®: what's nice about that is, even though we're prepping this month, maybe in August, and then probably not meeting with that client, possibly till mid or late October.

440

01:04:14.760 --> 01:04:31.649

Robert Hansen, CFP®: It's we can rewatch the video, and there's a section in our notes templates of recent updates since the video was created. Or we can grab some like email communications that are relevant leading up to it. And it just really calm down the level of stress during search

441

01:04:33.450 --> 01:04:34.840

Robert Hansen, CFP®: the

442

01:04:35.760 --> 01:04:39.899

Robert Hansen, CFP®: kind of jumping in on some of the

443

01:04:39.990 --> 01:04:41.460

Robert Hansen, CFP®: meeting. Prep.

444

01:04:42.330 --> 01:04:43.670

Robert Hansen, CFP®: we

445

01:04:44.450 --> 01:04:55.295

Robert Hansen, CFP®: because we're using salesforce. And I'll just show. This is my my sister and brother-in-law. They're not technically clients. We just help them give them advice. So

446

01:04:56.960 --> 01:05:15.520

Robert Hansen, CFP®: salesforce. If you're not very familiar with it. It is a beast. It's massive, but a lot of cool things. You can do it and customize in it. If you're willing to put in the effort or hire someone to help you do that. One of the things is we found the software called Drive Connect, where we're able to create all these meeting note templates

447

01:05:15.890 --> 01:05:28.520

Robert Hansen, CFP®: based off of whatever search meeting we're having, whatever conversation we're having, and then we can jump in and fill them out. So I was going to show real quick. This is just us grabbing a late year template

448

01:05:28.630 --> 01:05:32.459

Robert Hansen, CFP®: so we can start to prep for that conversation with them.

449

01:05:32.920 --> 01:05:38.699

Robert Hansen, CFP®: and it automatically pulls the template in it, adds it to their Google drive folder

450

01:05:38.810 --> 01:05:49.319

Robert Hansen, CFP®: in the the correct spot, and it gives the ability for all the different team members.



Whatever the role is to make sure, do we need documents? If so, do we have them or not?

451

01:05:49.470 --> 01:05:52.999

Robert Hansen, CFP®: Kinda laying out the organization for each meeting

452

01:05:54.610 --> 01:05:59.979

Robert Hansen, CFP®: to help Ben on the team really focus on just the planning, not really where we left off.

453

01:06:00.300 --> 01:06:02.770

Robert Hansen, CFP®: So this is one of the

454

01:06:02.930 --> 01:06:04.290

Robert Hansen, CFP®: just templates

455

01:06:04.540 --> 01:06:06.920

Robert Hansen, CFP®: really basic. But it's

456

01:06:07.000 --> 01:06:09.360

Robert Hansen, CFP®: some of the main details at the top.

457

01:06:11.150 --> 01:06:18.980

Robert Hansen, CFP®: one page plan information from Salesforce. We do all of our one page plans in our Crm. And keep it up to date there.

458

01:06:19.010 --> 01:06:28.159

Robert Hansen, CFP®: and really helpful for later. I'll explain later. But recent communications, as they come in after the notes are prepped and ready to go

459

01:06:28.570 --> 01:06:30.999

Robert Hansen, CFP®: some other information right from

460

01:06:31.070 --> 01:06:37.699

Robert Hansen, CFP®: salesforce, which is nice. It can pull in all the data. And then this is where we get to the meeting notes

461

01:06:37.720 --> 01:06:40.670

Robert Hansen, CFP®: next steps, post meeting work, all that kind of stuff.

462

01:06:41.350 --> 01:06:42.410

Robert Hansen, CFP®: So

463



01:06:43.160 --> 01:07:08.960

Robert Hansen, CFP®: it looks massive, the amount of stuff that's in there. But really it. It really helps us stay on top of. We're not missing anything. We're staying in in line with kind of the conversation. What we want to go through. They're getting all of the aspects of that surge in their plan. And this is their midyear meeting. This is their tax planning meeting, where we kind of laid out all of the details. So this is what we just went through with them.

464

01:07:09.200 --> 01:07:21.129

Robert Hansen, CFP®: But you can kind of see again notes that happened during the meeting. Anything relevant. We wanted to make sure. We pointed out. And then afterwards the follow up email and task lists. That kind of thing

465

01:07:21.500 --> 01:07:31.309

Robert Hansen, CFP®: so just helps us stay organized as a team. Make sure everyone's on the same page. Some of the things I did want to point out that really help with this are

466

01:07:33.980 --> 01:08:01.309

Robert Hansen, CFP®: I guess the different software tools one. We found this tool called notebook. Lm, I don't know if anyone else is using. It's a beta with Google, it's a AI tool. And because we use Google drive really happy, it's a AI tool that came out just for Google drive. And we happen to use it. It is incredible for what it can help us do preparing for meetings so wanted to share this tidbit. But this is like you.

467

01:08:01.490 --> 01:08:21.619

Robert Hansen, CFP®: We have a client notes folder for all of our clients, and as we're preparing for research meeting, we actually bring in what is notebook. Lm, say anything we should be aware of, you can actually pull in every client note you have. We also use fireflies, and we save off the dictation from the meetings. So it pulls in dictation as well.

468

01:08:21.620 --> 01:08:31.604

Robert Hansen, CFP®: And it really shows here's a timeline of everything we've worked on and discussed with them some characteristics. It's things about both of them.

469

01:08:32.552 --> 01:08:52.870

Robert Hansen, CFP®: it's incredible. We were actually in a meeting the other day. One of our clients said they just got back from London, and I just typed in vacation into the notebook. Lm, and it said they were going to go to Europe to visit their cousin. They told us that like a year and a half before. So I said, oh, that's right. Your cousin lives there, and they lit up

470

01:08:52.870 --> 01:09:03.380

Robert Hansen, CFP®: because they did not think I'd remember that, or they even mentioned it. So it's just an incredible tool that can really organize things. And what's nice tools? AI, a lot of it's

471

01:09:03.380 --> 01:09:14.170

Robert Hansen, CFP®: can I trust what it's saying? It pulls everything in, and you can actually grab. There's links to it, pulled it from this note, so it just jumps right over to it, so you can verify what the note saying



472

01:09:14.770 --> 01:09:15.800

Robert Hansen, CFP®: so

473

01:09:15.880 --> 01:09:17.762

Robert Hansen, CFP®: super helpful tool!

474

01:09:18.620 --> 01:09:39.590

Robert Hansen, CFP®: I did mention fireflies where we have that join every single surge meeting because of the post meeting work, the follow up because I'm in again every single meeting. I can't worry about meeting prep or meeting our post meeting work. I need to make sure the team has that covered. So I can just focus on the conversations each day.

475

01:09:39.660 --> 01:09:43.510

Robert Hansen, CFP®: So it really is. As long as these things.

476

01:09:43.520 --> 01:10:02.270

Robert Hansen, CFP®: We're staying on top of them. I can be in those 6, 7 meetings a day that I love doing, that. I get my energy from that without stressing about this person didn't get to follow up yet. I dropped the ball on this task. I haven't prepared for the conversation for tomorrow. All those things that can really impact the current conversation. You're having

477

01:10:05.770 --> 01:10:08.789

Robert Hansen, CFP®: going through my list of stuff.

478

01:10:09.360 --> 01:10:12.179

Robert Hansen, CFP®: One of the things we do is

479

01:10:12.300 --> 01:10:27.459

Robert Hansen, CFP®: still using Google sheets for a lot of the meeting prep, and kind of staying on top of everyone's work. We do use a little bit of workflows as well, but something as simple as this is a kind of a made up week for us, but

480

01:10:27.680 --> 01:10:52.879

Robert Hansen, CFP®: outside of surges you could see something similar to this, where we have a list of however, many meetings, or learn more calls, conversations. Who's going to them what the meeting type is who's preparing for it so that way. We can always stay on top of each Friday. Is everything ready to go for next week? What do we need to talk about and discuss the loom videos that we can always circle back to

481

01:10:52.880 --> 01:11:14.510

Robert Hansen, CFP®: and rewatch. Make sure we're ready for that conversation. Any relevant topics that we need to call out when having that conversation? And then as well, the post meeting work. So this has been extremely helpful with, follow up, go out to the one page, plan salesforce get taken care of and updated, or all the tasks in there, everything good to go



482

01:11:14.580 --> 01:11:18.229

Robert Hansen, CFP®: so that way we can close this tab out and focus on the next week.

483

01:11:22.910 --> 01:11:31.760

Robert Hansen, CFP®: One of the other things I wanted to show is just how important it is for us to keep up with our one page plans in salesforce. I'll zoom in on this.

484

01:11:32.050 --> 01:11:37.930

Robert Hansen, CFP®: This is another reason we love using the Crm is

485

01:11:38.290 --> 01:12:01.909

Robert Hansen, CFP®: they have the one page plan, functionality kind of built out in here to where we. It's a part of our prospecting process, and it goes from that. Learn more call. We have that discovery meeting that plan presentation. And that's where we deliver the one page plan. Pdf, and if they sign up we get it into salesforce, and we're always tracking and staying on top of it here. What's nice about that is.

486

01:12:01.910 --> 01:12:18.920

Robert Hansen, CFP®: we always have next meeting agendas listed out future planning topics, anything that they brought up that they want to address, or we need to prioritize next meeting documents. If we know we need something or not coming up to the next surge. And then, if they're still in that onboarding phase, things we haven't got to yet

487

01:12:19.252 --> 01:12:42.790

Robert Hansen, CFP®: as well as their open tasks and recently completed tasks. And one of the reasons I love. This is one of the questions we had earlier was, how early do we send out the agendas for the meeting? They actually get the 1st Tuesday of every month. a 1 page plan email summary of this showing. Here's their next meeting agenda documents we need for that conversation what tasks they're currently working on.

488

01:12:42.830 --> 01:12:54.199

Robert Hansen, CFP®: And what's really nice about that, they know it's automated. We don't have to put a lot of effort in to make it pretty or personalized but that, plus the surges.

489

01:12:54.600 --> 01:13:22.600

Robert Hansen, CFP®: have literally changed our company from. I don't think we've lost a client in the last 3 years. Besides them passing away, or we fired a couple of clients. The retention rate. When you're doing surges and really staying on top of this stuff, we used to get a lot of what's coming up. What's next? When are we getting back together? Because we were trying to do that? Let's get together once a quarter thing, and it was just a nightmare to keep up with so surges for us.

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01:13:22.620 --> 01:13:43.179

Robert Hansen, CFP®: Yes, it's been chaotic. It's taken us a few years to get to this point, but we're getting all of the work done. We're getting all the post meeting work done for the 1st time. Ever. We have everybody going through the process. They know what's coming up. They don't even ask questions



anymore. It's 100% retention rate. It's just incredible. So it's

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01:13:43.330 --> 01:13:52.219

Robert Hansen, CFP®: great for our company great for our team, but also, I think, the best way to serve clients. And yeah, it's just been huge for us.

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01:13:53.690 --> 01:13:59.310

Robert Hansen, CFP®: One of the other things I did just want to say is, make sure as you're building out your search

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01:13:59.940 --> 01:14:01.320

Robert Hansen, CFP®: kind of look at

494

01:14:01.540 --> 01:14:11.119

Robert Hansen, CFP®: if you don't have a team like we have set up. If it's just yourself or if you do have a team, what are your strengths, and what can you offload

495

01:14:11.568 --> 01:14:31.930

Robert Hansen, CFP®: for me? I have a 2 in. Follow through from my Colby test. I cannot do post meeting work, no matter what. If you gave me 10 h of post meeting work a week or 70 h of client meetings. I will always pick the 70 h, and because of that I needed to offload post meeting work. We have 2 part time.

496

01:14:32.060 --> 01:14:58.630

Robert Hansen, CFP®: basically, client service associates. That are doing all of the post meeting work for us and staying on top of it and leveraging something like fireflies, where, as the meeting ends, you say to the client, here's everything that we're going to do and get done over the next few weeks and summarize it. So it's all in there and delivered to the client service people so they can take it over is been huge for us.

497

01:14:58.904 --> 01:15:09.349

Robert Hansen, CFP®: You really gotta look at like what your strengths are, what you want to focus on and doing. That was, there's a whole lot of I should do the follow ups. I feel guilty that I'm not, but

498

01:15:09.390 --> 01:15:33.959

Robert Hansen, CFP®: it's much more important for me to be able to be in 5 or 6 meetings and make sure they go extremely well, and still have room for one or 2. Learn more calls or discovery meetings for us, onboarding for clients, and just not waste any time or energy on that follow up work. So really just leverage who you are as a person, and who you might be able to bring in offload.

499

01:15:36.200 --> 01:15:41.360

Robert Hansen, CFP®: I think I bounced around a bit, but I think that's everything I was going to go through in the search

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01:15:41.810 --> 01:15:42.860



Robert Hansen, CFP®: process.

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01:15:42.860 --> 01:16:03.409

Allison Foulk: We? We have some questions for you, too, so let's go through those, and if anybody wants to jump in, feel free to do so. Let's see. So the 1st one was Matthew asked. He said. I think you said it. But how long is your search? Typically is that 120 meetings in both fall and spring.

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01:16:04.000 --> 01:16:06.130

Robert Hansen, CFP®: Yes, yeah. So we

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01:16:06.360 --> 01:16:08.159

Robert Hansen, CFP®: have about a hundred 25

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01:16:08.360 --> 01:16:15.900

Robert Hansen, CFP®: entities households that we invite to the summer and the mid year and late year surge. So

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01:16:15.960 --> 01:16:26.050

Robert Hansen, CFP®: 250 meetings that invites that are sent out, and 75 that are sent out in the goal planning, search.

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01:16:30.330 --> 01:16:32.179

Allison Foulk: Any follow up questions. Matthew.

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01:16:33.250 --> 01:16:36.630

Matthew Benson: No, I think that I think that that did. That's impressive.

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01:16:38.530 --> 01:16:45.850

Allison Foulk: Okay. Awesome. Todd is asking, when are you meeting with physicians that doesn't interfere with their day?

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01:16:46.320 --> 01:17:12.259

Robert Hansen, CFP®: So we start our meetings at 10 Am. And we have 6 slots last one starting at 6 pm. So that way, everybody's done by 7 so we can do the kind of wrap up. Make sure everyone's good to go by 7, 30, and log off, but that's Tuesday, Thursdays, Wednesdays, we make sure we're done by 5 30. So yeah, it's the 6 slots on Tuesday, Thursdays and 5 slots on Wednesdays. But

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01:17:12.420 --> 01:17:30.449

Robert Hansen, CFP®: with how fast we're growing. And we're in a kind of sweet spot of being able to tell people if they can't make the time. That it's just not going to be a good fit for us. So we're kind of spoiled that way. But yeah, we our 6 Pm. Slots fill up the quickest.

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01:17:31.780 --> 01:17:35.410

John Bohnsack, CFP®: Our 7 Am. Fill up the correctness we do. 7 Am. 3 days a week.



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01:17:37.580 --> 01:17:38.170

Allison Foulk: Makes sense.

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01:17:38.170 --> 01:17:49.299

Robert Hansen, CFP®: Secretly hiring just new advisors from Pacific time, because we're in Cincinnati Eastern time, so that way I can get all my evenings back in the next few years.

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01:17:50.105 --> 01:18:05.790

Allison Foulk: Okay, from Rashani, the advisor who does? Who does the meeting records a loom video after the meeting, creating a summary of the meeting. Why not just create a Crm note instead. Same thing. No.

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01:18:06.510 --> 01:18:13.540

Robert Hansen, CFP®: So sorry I must have misspoke on that one. So the advisor who's prepping the meeting

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01:18:13.670 --> 01:18:23.459

Robert Hansen, CFP®: creates a loom video of here's everything. I prepped the summary of the meeting. What's going on? How I got to the recommendations so that way

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01:18:23.680 --> 01:18:51.870

Robert Hansen, CFP®: us, as the ones delivering the meeting or with the client can kind of digest everything, push back with any questions or concerns, or add anything to the video or the notes, and then we deliver the meeting with the client there is. We actually don't do a loom video for after meetings. It's just taking that Firefly's dictation and summary for next steps and post meeting work.

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01:18:52.346 --> 01:19:06.159

Robert Hansen, CFP®: I would say. The thing I do love about switching the preparation with the scheduling is we only hit about 80% of our invites actually scheduling search meetings.

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01:19:06.180 --> 01:19:14.300

Robert Hansen, CFP®: So which we've been happy with, I have no idea if that's a good or terrible statistic. But the 80%,

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01:19:14.620 --> 01:19:32.069

Robert Hansen, CFP®: the other 20% of it. We have done the work. We have the loom video. So us as the advisor then says cool, I'll create a kind of more condensed few minute video of Hey, client, we missed you this surge. We tried to get you on a few different times and just

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01:19:32.070 --> 01:19:50.829

Robert Hansen, CFP®: weren't able to connect, but did want to let you know like, for tax planning did want to let you know. We see that you're maxing out your plans for the year. You're not running any issues there. We see no issues with tax withholding kind of give them that same summary and send it to them so they can walk away from it. So that's 1 of the nice things is.



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01:19:50.930 --> 01:20:01.239

Robert Hansen, CFP®: when we were doing the scheduling 1st the 20 we didn't get to. We just didn't get to that work until they scheduled the meeting, which was frustrating.

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01:20:03.440 --> 01:20:06.989

Roshani Pandey: Oh, so the loom video is for before the meeting, it's the prep.

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01:20:07.440 --> 01:20:11.449

Roshani Pandey: and it's between the team members before the meeting. Okay.

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01:20:11.740 --> 01:20:13.429

Robert Hansen, CFP®: Which is so helpful because.

526

01:20:13.430 --> 01:20:21.590

Roshani Pandey: Why not just meet over a zoom call and just do it? Why record a loom? Because it's just a 1 way communication right? Like there's no 2 way.

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01:20:22.210 --> 01:20:30.050

Robert Hansen, CFP®: So because Ben, on the team is preparing, I'd say 60, 70% of the meetings search meetings.

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01:20:30.110 --> 01:20:40.119

Robert Hansen, CFP®: and we have a hundred. Possibly in that 6 week window. We need those loom videos in order to really

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01:20:40.160 --> 01:21:06.220

Robert Hansen, CFP®: jump in quickly. Understand it. Not turn every single. Hey? This is what I prepared, what do you guys think into a conversation we'll get to, hey? There's 20 loom videos that were created this week and meetings prepped. We only have to talk about 3 or 4 of them, because we're all on the same page for the other 1617. And what's nice, too, is we won't have that conversation for possibly a month or a month and a half later, and I can rewatch the loom video as many times as I want

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01:21:06.220 --> 01:21:10.450

Robert Hansen, CFP®: to kind of refresh myself. Make sure I'm on the same page ready to go.

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01:21:10.470 --> 01:21:20.440

Robert Hansen, CFP®: And it's been really nice because we've been doing this for a couple of years we keep like I can re-watch their tax plan from last year before I dig into the loom video for this year's tax plan.

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01:21:21.670 --> 01:21:22.420

Roshani Pandey: Thanks.



533

01:21:25.330 --> 01:21:25.670

Allison Foulk: Done.

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01:21:25.670 --> 01:21:33.350

John Bohnsack, CFP®: Yeah, Robbie, I think that's that's smart, because there's so much coming at you to be able to pull that. That's a takeaway for me today. Honestly.

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01:21:36.085 --> 01:21:39.490

Allison Foulk: Bridget, do you have a question about that?

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01:21:39.490 --> 01:21:40.470

Bridget Borel: I just wanted

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01:21:40.920 --> 01:21:52.820

Bridget Borel: and clarify are the loom videos strictly internal? Are you sending these to the client as well as like a here's what we're going to discuss kind of like in a video agenda.

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01:21:53.430 --> 01:21:55.520

Robert Hansen, CFP®: So they're strictly internal

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01:21:55.600 --> 01:22:18.429

Robert Hansen, CFP®: unless the client does not sign up for the search meeting, and then we still want to show them we did work and kind of give them a touch point. So I since I'm leading the relationships, I re-record the video myself from like a 10 min summary from Ben to me to a 3 to 5 min client facing Summary, and I send that to them.

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01:22:18.770 --> 01:22:21.229

Robert Hansen, CFP®: That's the only time we're sending videos.

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01:22:21.610 --> 01:22:22.796

Bridget Borel: Great thanks.

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01:22:24.420 --> 01:22:32.869

Allison Foulk: Awesome. Okay? From Steven. When you're using fireflies during meetings, how did you initially introduce that and frame that to the clients.

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01:22:33.740 --> 01:22:34.840

Robert Hansen, CFP®: So

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01:22:35.270 --> 01:22:53.789

Robert Hansen, CFP®: when you bring it in, you can actually rename it in zoom to just notetaker. And I do that, because when people see the word AI. They tend to panic. But we literally tell them, hey, we have this AI tool that makes sure I get done what I'm promising you today, and no one's ever pushed



back on that.

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01:22:54.170 --> 01:22:54.990

Robert Hansen, CFP®: So.

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01:22:57.270 --> 01:23:02.189

Robert Hansen, CFP®: But yeah, just taking the word AI out of the name eliminated all questions about it.

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01:23:03.932 --> 01:23:13.819

Allison Foulk: Debbie's asking, does that mean you put all of your meeting notes into Google Docs, not red tail? Or does the AI tool integrate with your Crm.

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01:23:14.940 --> 01:23:16.909

Robert Hansen, CFP®: All of it goes into Google docs.

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01:23:17.840 --> 01:23:23.789

Robert Hansen, CFP®: So there's stuff that will take out of the meeting notes because of, let's say.

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01:23:23.820 --> 01:23:48.690

Robert Hansen, CFP®: on the tax planning meeting. We adjusted distributions or certain tax planning recommendations. There's areas of our Crm that we need to update because of the meetings conversation. But everything else just stays in the Google notes. And we just pull it into future discussions from there using notebook. Lm, and

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01:23:49.112 --> 01:23:55.449

Robert Hansen, CFP®: it's it's easy also to just read through what happened last meeting just takes a couple of minutes.

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01:23:58.716 --> 01:24:07.290

Allison Foulk: Roshan is wondering. Fireflies over fathom AI. Did you test multiple? How did you settle on that one.

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01:24:07.750 --> 01:24:21.530

Robert Hansen, CFP®: My dad so we're both 9 and quick start in our Colby 2 for follow up. So follow through so he loves this stuff, so he's tested all of them. I don't really know why he chose fireflies.

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01:24:23.380 --> 01:24:46.070

Allison Foulk: yeah, I believe that Stephanie and Michael had a conversation. About this and Michael had tested a few, Michael kidsis and said, yeah, fathom is a pretty good one. So that's what we use. We've heard good things about fireflies, too. So I think one of those, or test your own. So those those 2 are vetted at least.

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01:24:47.660 --> 01:24:54.709

Allison Foulk: okay, rashani says it records a meeting, and people sometimes don't like that right? So framing like Stephanie mentioned.

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01:24:55.113 --> 01:24:59.230

Allison Foulk: Timothy is asking, are you using Hosta plan for your tax planning.

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01:24:59.870 --> 01:25:03.887

Robert Hansen, CFP®: Yes, yeah. Holistic plan is huge for us.

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01:25:04.470 --> 01:25:14.890

Robert Hansen, CFP®: Ben is our tax expert. That's why he came on the team. He's obsessed with all things tax related. So yeah, he's really focused in holistic plan. And

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01:25:15.310 --> 01:25:36.530

Robert Hansen, CFP®: that's why, again, the loom videos are so helpful. I am so far from a tax expert. I have my Cfp. But I don't think I'll ever be an expert in any aspect of financial planning total honesty. But I get my energy from just being with the clients. I'd rather it's sometimes you get into these meetings where Ben put together 6 7 pages of notes.

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01:25:36.530 --> 01:25:52.110

Robert Hansen, CFP®: and I'd rather just talk to them about their feelings and what's going on in life, and all the other things a part of their plan. But yeah, just making sure you have that person that's building out the plan. And they're in a good spot and we're able to deliver it. The the loom video helps out a ton with that.

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01:25:56.420 --> 01:26:03.970

Allison Foulk: Hey? John Zox is the one that is specifically for financial planning. It looks like the Adam, and you are.

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01:26:03.970 --> 01:26:07.460

John Bohnsack, CFP®: Yes, that's the one we're we're using right now.

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01:26:08.450 --> 01:26:10.910

Allison Foulk: and you're having you like it. You're having success.

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01:26:10.910 --> 01:26:30.829

John Bohnsack, CFP®: Yeah, we're having success with it. I guess the feedback I would give to any advisor is just like a car is a tool to get us places. AI is a tool to get us places, and you have to do things with the car. You have to drive the car for it to work properly. And so that's the same thing with AI. So when I'm using AI, I have to phrase things separately, so

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01:26:30.930 --> 01:26:35.009

John Bohnsack, CFP®: like, Oh, clients. So we're saying, we're gonna open an Ira

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01:26:36.240 --> 01:26:47.290

John Bohnsack, CFP®: traditional Ira for you. And we're gonna and we're gonna contribute the maximum for 2024 into it. So you just kind of have to learn your phrasing to make sure the AI picks up on it.

567

01:26:49.700 --> 01:27:09.680

Allison Foulk: okay, great. I think we made it through all the questions in the chat, if you have any any remaining feel free to unmute. We can make this into a conversation, Robby and, John, if you have any additional thoughts or anything you you want to summarize, as we're wrapping up here in the next few minutes.

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01:27:09.680 --> 01:27:10.599

John Bohnsack, CFP®: There's a couple.

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01:27:10.600 --> 01:27:15.159

Stephanie Bogan: I always feel like people forget to just unmute and have a conversation.

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01:27:16.100 --> 01:27:24.239

John Bohnsack, CFP®: And a couple of personal things that will help one bullet point that I have is once that initial email goes out to all your clients about.

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01:27:25.110 --> 01:27:26.530

John Bohnsack, CFP®: Surge scheduling.

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01:27:27.010 --> 01:27:38.832

John Bohnsack, CFP®: you don't own your calendar anymore. So if there's anything personal that you want to make sure that you block during that time you make sure you do that before that email come comes out

573

01:27:39.320 --> 01:27:50.950

John Bohnsack, CFP®: and so cause if you have to reschedule just adds unnecessary comp complication. And then also, when I'm in surge, I have a conversation with my family being like, this is Dad's busy time.

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01:27:50.970 --> 01:28:03.699

John Bohnsack, CFP®: So I need you to do this or these or these things, and because I do search, it means I get to do XYZ. With you when I'm not in search and set expectations. Which is.

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01:28:03.900 --> 01:28:06.759

John Bohnsack, CFP®: which has been really great for for me. I I love it from that side.

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01:28:06.760 --> 01:28:10.309

Stephanie Bogan: Yeah, you you talked about you and Robbie both talked about this earlier

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01:28:10.470 --> 01:28:26.630

Stephanie Bogan: and the thing that I always add. I know you echoed. Follow up, because I'm a freak about the follow up and bucketing is that there's no one way to surge it when we talk about surging. Think of it like you can surge it tight, like Robbie and Chris. Do.

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01:28:26.630 --> 01:28:27.180

John Bohnsack, CFP®: This.

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01:28:27.180 --> 01:28:49.429

Stephanie Bogan: And you're just gonna have a bigger wave, right? So you've got to again allow for the follow up. And they do nice like things I always recommend is like, take a break in between. If it's a shorter surge, you can take 3 days off if right, if it's a 9, 10, 12 week. Surge right to John's point, like, take the week before a week in the middle, right? Giving yourself breaks, because when you're in surge.

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01:28:49.450 --> 01:29:06.119

Stephanie Bogan: if you're doing it right. It's all you're doing. So the biggest mistake, aside from prep and follow up right is is that we try to do other things. And so you again, if your surges are 16 weeks long, you're gonna need to have breaks

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01:29:06.260 --> 01:29:24.310

Stephanie Bogan: for some client interaction, and certainly for some prospects in there, right, so you can block days the way that Adam does now. Right? It's, you know. Prospect calls on Tuesdays or Tuesdays and Thursdays. I promise people will wait 3 to 5 days, if not weeks. Adam's had a waiting list many times, just on and off, depending on how.

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01:29:24.310 --> 01:29:25.389

John Bohnsack, CFP®: Busy. Day. Yeah.

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01:29:25.841 --> 01:29:30.210

Stephanie Bogan: Right. Chris and Robbie have the same thing when you get those growth engines going

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01:29:30.380 --> 01:29:34.670

Stephanie Bogan: right there. We call them hiccups Hqps. High quality problems.

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01:29:35.300 --> 01:29:55.450

Stephanie Bogan: but surges, you know. Christy Raines, I don't know she's on. She's got 3 now, 4 kids under the age of like 5, like if she's out 3 days because a kid is sick like in surge, she's 20 meetings behind. So for her, at this point in life, she does like what I'll call Mini surges.

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01:29:55.560 --> 01:30:09.529

Stephanie Bogan: So if you're nervous about surges, you don't have to do 6 weeks or 9 weeks of the death march at 6 meetings a day. I would never do 6 meetings a day like at 4 meetings. My brain I can do 5 calls a day, I figured out.

587



01:30:09.630 --> 01:30:12.400

Stephanie Bogan: but by like 6. I'm just like I gotta get.

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01:30:12.834 --> 01:30:18.220

Stephanie Bogan: Now here, Caveat Robbie and Chris in particular, have a very defined niche.

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01:30:18.500 --> 01:30:35.049

Stephanie Bogan: The narrower your niche. The more meetings you can do because they they get really efficient optometry like they're on a schedule. They're not talking about everything in every meeting which is right. Year one Mvp. Service model model meetings and surges.

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01:30:35.270 --> 01:30:52.059

Stephanie Bogan: Get those 3 things nailed. Then you're gonna hit the next evolution of your service model. Now you can start putting it on a calendar. You can do value, adds Step one. Get the get those tracks laid. Feel free. We have people, Ben Brandon, if you guys remember, Ben started

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01:30:52.280 --> 01:31:14.830

Stephanie Bogan: doing. Co. He's like now, the surge master right? But he started with a quarterly surge because that was what he felt like. He and his team could kind of acclimate to, and then they were like, Oh, we get it! And then they went to twice a year like, so now, right? So they kind of eased into it. If you've got young kids, or you're a little bit concerned about being like blocked up so much, you can stretch them out

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01:31:15.197 --> 01:31:34.549

Stephanie Bogan: or I like to do them in quarterly cycles. Right. Do 2 meetings, a quarter, 2 weeks, a quarter, and then off 2 weeks a quarter, and then off. You just have to decide when when to make sure that that timeline works, depending on what you're covering when so that's just a long way of saying surges can work for anyone.

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01:31:34.550 --> 01:31:35.020

John Bohnsack, CFP®: Yep.

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01:31:35.339 --> 01:31:49.400

Stephanie Bogan: One of the advisors is Dana? No, she did a a catches, a kits's post on. Why, surges don't work for me, and I was like great like, absolutely like, I am not gonna tell you. You have to do surges.

595

01:31:49.720 --> 01:32:07.669

Stephanie Bogan: I'm gonna tell you that you can do searches in a way that really deepens value to clients. Because you're clear. You're focused. You've got an agenda like you know what you're there to do. You've got a great process for following up. So that consistency and reliability that is so important to the relationship.

596

01:32:07.760 --> 01:32:33.670

Stephanie Bogan: And it's just hyper efficient because you and the team are like. This is what we're doing over and over. It becomes like right, just the factory. And I don't mean that in a way that cheapens



it. Scaling up in this case doesn't mean we water down. It means that we deliver more specialized services. We're just good business people. So we've learned how to do it hyper efficiently, and when you combine deeper value to clients

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01:32:33.760 --> 01:32:58.610

Stephanie Bogan: with more efficiency at the office, right? We're in the process that, ladies and gentlemen, is how you get to enjoy the ride and the rewards, because it's good for clients. It's good for business, and it's ultimately good for everyone. So Robbie and John thanks so much for taking the time. If you guys have any other questions, please feel free to drop them on tribe but it looks like we covered a lot of ground today.

598

01:33:00.750 --> 01:33:06.479

Allison Foulk: Yes, and 1 1 final question here from Julie. Are you using a financial planning tool?

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01:33:07.410 --> 01:33:07.930

Allison Foulk: Yep.

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01:33:07.930 --> 01:33:17.690

Robert Hansen, CFP®: We use right capital. So the only mass update we do to that and focus of right capital is in the late year kind of financial independence search.

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01:33:17.800 --> 01:33:23.429

Robert Hansen, CFP®: So throughout the rest of the year, we're not really focusing on it too much unless clients have questions in it.

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01:33:24.290 --> 01:33:27.170

John Bohnsack, CFP®: Yeah, we use e-money, as I mentioned, I believe, earlier.

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01:33:28.570 --> 01:33:34.310

Stephanie Bogan: Can I just ask you quickly how much time you actually spend on the plans and the documents

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01:33:34.430 --> 01:33:37.510

Stephanie Bogan: relative to just overall conversation.

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01:33:39.360 --> 01:33:40.300

Robert Hansen, CFP®: The

606

01:33:40.360 --> 01:34:10.069

Robert Hansen, CFP®: I would say Ben would be frustrated if in some of the meetings there's times I'm like. Then put 6 pages of tax planning notes together. But I know you don't care about that stuff, and you're in a good spot. So I was like, How's vacation? That kind of stuff. But yeah, it's a lot more on the relationship building, knowing that since we're surging and we're doing all of the work efficiently and providing all this value that we really don't have to focus on it. That much for clients. We can just focus on the relationship.



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01:34:10.580 --> 01:34:12.250

Stephanie Bogan: That's awesome, John. How about you?

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01:34:13.680 --> 01:34:16.410

John Bohnsack, CFP®: Yeah, I not much, not.

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01:34:16.410 --> 01:34:27.640

Stephanie Bogan: So so plans. I just I say that to highlight that that the the client meeting is not a plan document review the way that it shouldn't be an quarterly investment. Review

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01:34:27.800 --> 01:34:40.049

Stephanie Bogan: the plan and the process. If you've listened to Robbie and John, it takes a bit of time, but once you lay the tracks, and then you start turning the flywheel, as Adam likes to say.

611

01:34:40.050 --> 01:35:02.979

Stephanie Bogan: by year. 2 like it just becomes a system for you and for clients it's like any resistance like. And and to Robbie's point, you're just constantly tweaking how efficient you can get what you can standardize and automate. And over the course of about 3 years you can go through everything your estate planning checklist or 5 29. Your somebody died somebody dead

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01:35:02.980 --> 01:35:17.487

Stephanie Bogan: like everything. Adam's like. I don't know over 90 at this point. Unless you buy redtail workflows from Adam, which I always recommend cause. That is the shortest distance. If you've got red tail like, why would you do that on your own

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01:35:18.290 --> 01:35:27.909

Stephanie Bogan: other than that? If you have a system where someone is selling customizations by them, because it's faster than building them on your own. Otherwise you're gonna sit down with your team.

614

01:35:27.930 --> 01:35:42.649

Stephanie Bogan: And as you build out your Mvp. Service model like meetings agenda model meeting. And then you get into, hey, we're gonna cover tax planning in this spring. We're gonna do this in the fall Liz hand does a really cool thing

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01:35:42.670 --> 01:36:09.130

Stephanie Bogan: on the softer side, right? Because obviously she loves coaching. But anyone could do it is she sends out life planning kind of stuff one at least once a year. Clients don't have to fill it out, but it's like, Hey, you want to update your retirement plan or your vision, or you want to talk about like, you know, what do you want it to be? You know, here's our little worksheet to help you, and a video and click this calendar link. And I, Liz, will be happy to talk to you. Oh, my God, she loves when people click that link

616

01:36:09.190 --> 01:36:22.179



Stephanie Bogan: because they want to talk about stuff that she wants to talk about. If it were technical, right, she would have a batch of people that she knew wanted to talk about a technical topic. So you really can start to layer outside of the meetings

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01:36:22.190 --> 01:36:43.440

Stephanie Bogan: the work, so that to Robbie and John's boy the meetings are like, everything's good. Right? Yeah, okay, what do we want to talk about like it? They people just get used to it. They're like, Oh, we did this we did this. Yep, the taxes are always like he's got the 6 pages of notes. If there was something he would tell me and it takes that trust equity which is the most valuable currency you have, and it just

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01:36:43.770 --> 01:37:00.969

Stephanie Bogan: amps that over a couple of years, because the consistency, the reliability, the professionalism. The thorough like it just all comes to bear in a way that is really world class compared to the experience that most people are getting in, even in good advisory firms. So.

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01:37:01.250 --> 01:37:05.999

Stephanie Bogan: John, robbery, thank you so much for your time. You guys, as you implement surges

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01:37:06.400 --> 01:37:12.200

Stephanie Bogan: bring those questions to tribe, obviously to office hours, and we will do everything we can to support you. You guys, thanks so much.

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01:37:13.180 --> 01:37:14.180

Robert Hansen, CFP®: Thanks, everybody.

622

01:37:14.180 --> 01:37:14.870

John Bohnsack, CFP®: Thanks.

