

TOP *of the* TABLE

ANNUAL MEETING 2015 | NAPLES • FLORIDA • USA

SESSION HANDOUT

David E Appel, CLU, ChFC
&
Marcus T. Henderson Sr., LUTCF


Two Roads Diverged In Wood

Focus Session
Thursday, Oct. 8th 2:45 pm



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A person in a dark coat and hat stands at the center of a road that splits into two paths. The person is holding a briefcase in their right hand. The road is paved and has white dashed lines down the center and solid lines on the sides. The background is a dark, misty landscape with a light blue sky. The overall mood is contemplative and somber.

**“I SHALL BE TELLING THIS WITH A
SIGH SOMEWHERE AGES AND AGES
HENCE: TWO ROADS DIVERGED IN A
WOOD, AND I— I TOOK THE ONE LESS
TRAVELED BY, AND THAT HAS MADE
ALL THE DIFFERENCE.”**

**THE ROAD NOT TAKEN
BY ROBERT FROST**

IN THE BEGINNING...



Fish Jumping Into Boat



**“Thinking With Two Brains,
While Striving For
The Same Goal...”**

The look of...



**“Thinking With Two Brains,
While Striving For
The Same Goal...”**

The look of...



Today's Agenda

- ❖ **Marketing & Positioning**
- ❖ **Practice Management**
- ❖ **Centers of Influence – COI**
- ❖ **Client Appreciation Events**
- ❖ **What We Have Learned Over the Years**
- ❖ **Where We See Our Firms In 5 Years**

Marketing and Positioning

- ❖ **Facebook & LinkedIn**
- ❖ **Get Out Of The Office**
- ❖ **Industry Respected Advisor**
- ❖ **My Book “The Best Business Card”**
- ❖ **One Firm, One Specialty, One Focus**

Marketing and Positioning

- ❖ Facebook With A *“Twist”*
- ❖ Community Embracing Firm
- ❖ Denominational Positioning
- ❖ Diversity of Specialties
- ❖ Marketing & Public Relations Firm

Practice Management

- ❖ **Weekly “In The Mill” Case Review**
- ❖ **Use “Red-Flag” Questionnaire Prior To Underwriting**
- ❖ **APS, In-House Gathering System**
- ❖ **Sales & Service System Custom Database/So We Deliver Our Promises**
- ❖ **Team Consistency & Unique/Distinct Roles**

Practice Management

- ❖ **A Chief Operating Officer**
- ❖ **SmartOffice Is Our Foundation**
- ❖ **The Office Experience – “*Touches*”**
- ❖ **The Kolbe Index**
- ❖ **A Strategic Coordinator**

Centers Of Influence - COI

- ❖ **Road Show**
- ❖ **Estate Planning Counsel Sponsorship**
- ❖ **Heckerling Institute**
- ❖ **Advisor Days, Annual Holiday Dinner & Outings**
- ❖ **Email Blast: Targeted, Relevant**

Centers Of Influence - COI

- ❖ **In-House Attorney & CPA CE's**
- ❖ **Attorney & CPA Calendars**
- ❖ **Credentialing Package Contents**
- ❖ **Drip Marketing Program**
- ❖ **Holiday Dinner Party**

Client Appreciation Events

❖ **Golf & Tennis Outings**

❖ **Professional Sporting Events**



Client Appreciation Events

- ❖ HFG Sweetheart Luncheon**
- ❖ League of Exceptional Gentlemen**
- ❖ Client Birthdays and Retirement Parties**
- ❖ “What They Support, We Support”**



What We Have Learned Over The Years...

- ❖ **NEVER Let Up On Prospecting...**
- ❖ **Don't Expect Your Staff To Run With An Idea...**
- ❖ **Learn To Accept No One Is You...**

What We Have Learned Over The Years...

- ❖ **Where There Is No Vision, The People and Business Perish. *“Stop and Think”***
- ❖ **Know YOUR Value To The Business**
- ❖ **Concentrate On Relationships; That’s Why Clients Leave**
- ❖ **“The Authentic You”**

Fast Forward to 2020: Where We See Our Firms...

- ❖ **Appel Insurance Advisors will have merged with a national life insurance firm via a succession plan resulting in 3 to 4 producers with a supporting staff of 10-12.**
- ❖ **I see a successful firm bringing in north of \$20M in annual revenue.**

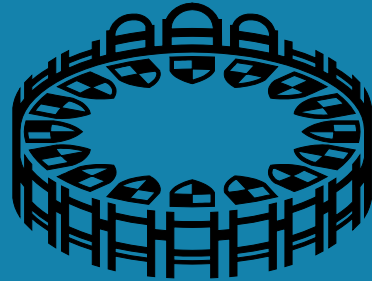
Fast Forward to 2020: Where We See Our Firms...

- ❖ Henderson Financial Group, Inc. will continue to be a leading regional firm with multiple advisors, producing anticipated revenue north of \$10M.**
- ❖ The New “Accepted” Model: Wealth Management, CPAs & Consultants, Business Advisors**

Our MDRT Study Group



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We cannot place enough value on our MDRT study group...it has been a game changer for us...

Any Questions?

