



Launchpad to a Double Agenda

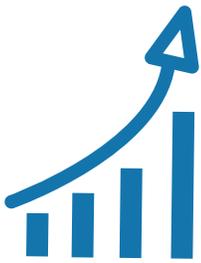
Instructors: Mike Birch, Frantz Widmaier, and Don Mallicoat

Monday, August 12

THE FIVE STEPS TO A DOUBLE

Mike Birch

While every FA's path to a double is different, there are five basic steps you *must* embrace in order to get there in 2-3 years. In this session, you'll learn how to implement those steps as quickly as possible.



CREATING A TWO-YEAR GROWTH PLAN

Mike Birch

Learn how to create and implement a *realistic* and *effective* growth plan that leads to a two-year double.* Then, Mike will take you through several real-life scenarios that will teach you how to overcome common obstacles to growth.

Monday, August 19

CLIENT MARKETING

Mike Birch

Your clients are a major part of hitting a double. Learn how to generate more business and capture more assets through our **NEW** client marketing strategies!

**All attendees will receive a customized Two-Year Growth Plan before the class.*



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Tuesday, September 3

EVENT MARKETING

Mike Birch

Client events have become a *tremendous* source for growth. In this session, you'll learn how to plan and execute events that are guaranteed to generate introductions with your clients' friends and family.

Monday, September 9

NETWORKING THROUGH EVENTS

Mike Birch

After reviewing the event plan you created the previous week, we'll look at actual events other FAs have held that can help you network with local business owners and COIs! Understanding how to transform your events into *networking opportunities* will greatly help you get more out of them.



Monday, September 16

WEBSITE USER-EXPERIENCE

Frantz Widmaier

In order to be effective, your website must create a strong **User Experience**. In this session, our COO, Frantz, will personally teach you the difference between a good experience and a bad, and how to engage visitors the moment they visit your site.





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Monday, September 23

DIGITAL ANALYTICS - THEORY

Don Mallicoat



No matter how good your website is, your prospects first have to *find it*. Don Mallicoat, our Marketing Director, will teach you the basics of Search Engine Optimization and Google Analytics so you can enlarge your "digital footprint".

ANALYTICS LAB

Don Mallicoat

Theory is one thing - execution is another! Next, Don will work with you to set up analytics/SEO on your own site.

Monday, September 30

SOCIAL MEDIA - THEORY

Frantz Widmaier

Social media plays an important role in any digital marketing campaign. Frantz will show how to use platforms like Facebook and LinkedIn for prospecting, plus the key best practices for each.

FACEBOOK LAB

Don Mallicoat



Learn how to use Facebook's tools - like posts, pages, and ads - to drive people to your website or seminar.



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LINKEDIN LAB

Frantz Widmaier



LinkedIn is more than just a place to post your resume online. It's also a fabulous prospecting tool when you use it right! Frantz will show you how to use your own LinkedIn account to find and connect with new prospects.

Monday, October 7

FAMILY FINANCIAL ADVISOR

Mike Birch

Learn how to take everything you've learned and apply it to becoming the financial advisor of record for your clients' *entire* family - including their children and other beneficiaries!

Monday, October 14

CREATING A REFERRAL NETWORK - Clients

Mike Birch

In order to double, you'll need to create a fine-tuned **referral machine** that produces new referrals every month. In this session, you'll learn the science behind how referrals work before we delve into our new *12-Month Referral Strategy*.



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Monday, October 21

ADVANCED CLIENT REFERRAL TECHNIQUES

Mike Birch

As a class, we'll review and critique the referral scripts you created after the last lesson. Then, we'll continue learning our *12-Month Referral Strategy* by focusing on more advanced referral-generation techniques.

Monday, October 28

CREATING A REFERRAL NETWORK - COIs

Mike Birch

When profiling the top FAs on the BGM System, most had one thing in common: a robust network of Strategic Partners who consistently provide referrals. In this session, learn how to identify and get in front of COIs in your community.

Monday, November 4

STRATEGIC PARTNERSHIPS

Mike Birch

After reviewing your COI introduction scripts from last week, we'll go a step further to learn how FAs like Rob Rose and Chad Henry turn COIs into full-fledged Strategic Partners. Through our *Strategic Partner Strategy*, you'll be able to form more partnerships than ever before with professionals who actually *want* to refer business to you!

