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ACCELERATING ENTREPRENEURIAL SUCCESS PODCAST

EPISODE  
**75**

**Erik Kerr**

Show Notes at: <http://www.aesnation.com/75>



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Best of success,



John Bowen  
Co-founder, AES Nation

**John Bowen:** As entrepreneurs, we have to communicate effectively, and with all the noises of marketplace, what a challenge it is? Today I have got a really special guest, someone who I count on helping us communicate in all the businesses I have, Erik Kerr and his partner are just amazing individuals. They have 20 years ... Erik has over 20 years of experience on the marketing side, I mean lead generation. Anybody as an entrepreneur, would you like to have more leads? He has generated campaigns tens and millions of dollars for me, millions of dollars he has helped brought in lead generation by simplifying the message, making it extremely clear.

What I'd like to do is, I've asked him to come on because I want to share ... He has been a secret to most people, but to really help you in understanding the art of being understood, make it impossible to be misunderstood by your client base so that you can not only serve your clients well, but attract a steady stream. I'm John Bowen. We're at [aesnation.com](http://aesnation.com), and we're all here to accelerate your success. Stay tuned. You'll be glad you did.

**Erik Kerr:** Thanks, John. How are you?

**John:** Excellent. It's great to get together with you even if it's virtual. You and I have hung out together on a lot of mastermind groups. I think we first met ... I want to give credit to Joe Polish, the Genius Network Mastermind Group. I remember saying, "Joe, should I use Erik and Summer, your partner?" He goes, "Yeah, I mean that will be one of the smartest thing you did." It definitely is true.

You've got some drawings behind you, the Draw Shop. Before we go into this whole process of really ... No matter what medium we're using, make sure that we're not misunderstood that we can communicate effectively so that we can accomplish our goals. Give us a little bit of background, how did you get to creating all these ... I'll use your toes behind you, the Kick-Butt Whiteboard Videos. I mean, my whole team loves them. My clients love them. My future clients love them. How did you get there?

**Erik:** Yeah. Well, it's interesting because we chose Kick-Butt, because everybody can do something, but if you don't do it in a kick-butt way, who cares, right? As we'll get into, that's one of the things that people are always asking is, "So what? Who cares? Why you?" The answer should be because we're kicked-butt at what we do.

Summer and I have 20 years of ... Summer feel like she was my partner and Co-Founder of the Draw Shop. We've got over 20 years of direct response, marketing, infomercial background and sales, building sales funnel. The challenge always there is differentiating yourself and communicating in a way that is going to lead the targeted listener or viewer to take the action that you want them to take.

When you can't do that effectively, you don't make sales, your business doesn't grow, you spent a lot of money, you have a lot of hopes and dreams that are dashed against the rocks, and it becomes very, very difficult and frustrating. We have spent our entire careers on fine-tuning that process of communication that leads to action. What we found is that the simpler you communicate and the more clearly you communicate, the better chance you have of succeeding and leading people to that action, because a confused listener is never going to do what you want them to do.

**John:** No ... Well, one of the things I love, and this is probably out of necessity you had to do this, because when we work together, we'll create a concept that I'll share with you, your team and then all of a sudden it's coming back and that's obviously transcribed and we are going. The message has to be very clear to draw it and to get it across effectively. What I found is that forced me to become clearer, and the more clearer and more elegant we can be, that's simple and elegant to get that message across is really powerful.

Before we go too far, I mean, you've been a marketing professional for a long time, Erik, and this is ... To me, business is all about two things; delivering a great client experience, and then attracting people to raise their hand to attract to work with us. The first part, most entrepreneurs think they've nailed that client experience, and they know they're going to prove it a little bit. Many of us wanted to nail that. We wanted to scale it up running that message out. How did you evolve into this marketing medium that you now do of using this whiteboard animation, because I mean it's a subset of marketing and you use that really effectively, but how did you get there?

**Erik:** Yeah, and really we look at it as one of the first dominos in a series of dominos that you would use in the sales process or communication process with the client. I think that we saw TEDx Talk, Summer and I did on ... That was drawn on a whiteboard and it was communicated so clearly, because every time a word is used or said, or anything comes out of our mouth, people have an image that they're trying to associate with that word.

When I say, "Financial planner," people think one thing. When I say, "A mountain," people would think totally out of all the mountains, they could have something totally different in mind, which isn't in alignment with what I'm trying to say. Using whiteboards, when we saw that, we thought, "Man, this is a really effective way of making things impossible to misunderstand," because as much as we try to communicate verbally, then having something drawn that people are watching and totally engaged with, and reinforcing that message and even drawing things in a way that you want them to understand because when you draw something a certain way, people don't go, "Well, that's not how I thought of it. That's not what I thought it meant."

They say, "Yeah, that's exactly what I thought it meant." You're in a way manipulating and engaging that communication for them to think the way that you want them to think. Summer

... I saw that video done by the TEDx Talk, and I send it over to Summer. We had just known each other through business; we had a client in common, and became friends then. I send that over and she said, "Let's do it." She went out and sold two or three of these videos with the purpose of being very specific marketing-oriented videos that drive action either on a homepage, which opt in or do something of that nature. She had sold two or three of these before we even knew how to set this thing up.

She said, "Okay, I sold two or three of these." I was running around camera shops trying to figure out how to do it. We had a hotbox, what we call it, where I put an artist, and it look like a torture chamber, to be honest with you, when we first had things set up. Of course four years later we've refined the process and grown quite a bit. That's kind of how we got started.

**John:** That's great. I mean we all have this journey that we're on and one of the things that happens as entrepreneurs ... I think we all should have gratitude and look back and reflect, because sometimes we get frustrated in our existing businesses that we are not having the success that we want because there is a difference. Dan Sullivan of Strategic Coach calls it, "Mind gap." We have this ideal that we think we are going to get. The actual is often times lower and we get caught between the gap between actual and ideal, and being frustrated. Then when we think about the journey that we've been on and look back and reflect on that gap between where we were and where we are now, I mean you guys have created some amazing, amazing tools, and you should be really proud.

**Erik:** Thank you.

**John:** Now, one of the things that I like that you've done, and I'm going to pull it up and this is not just on how did you whiteboarding it all. In preparation of this podcast, Erik's team put together a little drawing, which he just shot it over to me, so I'm just pulling it up. I've got it on the screen the art of being impossible to misunderstand in six easy steps. I look at it, Erik, and I go ... I'm usually coaching everyone as we're doing the podcast. I think I'm close to a hundred podcast recordings now; you're the only one that's ever had it. I mean a lot of people have it in their mind, but didn't send it to me in a drawing the whole thing. This is one of the powers of really putting, reducing things to writing. They don't have to be that artistic, but just putting it down.

**Erik:** Yeah.

**John:** Yeah ... Before we go into this, really your creative process you guys do, how do you do that? How do you bring that together?

**Erik:** Our creative process really comes down to whenever we work with a client and whenever we're trying to communicate something we always ask who's the audience? What

is it that we want them to do? What is the takeaway? Because something that we found, and this is working with the Chairman of Google, Eric Schmidt, Arianna Huffington to people who are very, very, very, successful. I mean literal billionaires down to the guy who has got an idea and he is working it out of his basement is they have so much that they want to say. It's a matter of choosing what to say and what the purpose of that communication is, and that's what this process breaks down for people.

We really put people through the ringer initially; trying to take ... Really saying, "If you have to say what you had to say in 60 seconds, what would that be?" "If you only have that 60 seconds, what would it be?" We start there as kind of the foundational, what are the two or three points, what is maybe just the one point that you want them to remember the most, and then what is the action that you want them to take?

Then being able to take those fundamental pieces and then we tailor it and start storytelling to the targeted audience. It's really understanding who your audience is as well. I can run-through these six steps, but those are the exercises we take people through. Often times they say that was the most valuable part of the whole process, because my ability to say succinctly who I am, what I'm doing, and the benefits to my targeted audience, I mean people have seen \$250,000 jumps in annual revenue within 30 days just because they're communicating so much more succinctly.

**John:** Yeah. This is what I'd like everyone to do, using the drawing that Erik and Summer and their team put together, but what I'd like you to think about, it doesn't matter what you draw, is to reduce the stuff in writing. I'm one of those guys that I can talk an awful lot. We have many friends that can do that too, Erik. Often times, we're not as clear as we think we are, oh, boy, those important messaging points that you have, if you take the time and really work through this process that we're going to go over, it's so powerful.

I'm going to put up a graphic. I want to go the very first part before we dive into the 6 steps. How important it is? I mean you've drawn this, and being impossible to misunderstood, I understand it really dramatically increases sales and what we're all about is we want to help you accelerate success. I love the drawing between the guy and the girl here. Yeah, I think there's many other women on viewing this or listening this ... If you're listening to it, go to [aesnation.com](http://aesnation.com) because you got to have this, so you can download the drawing.

The ability to see a guy going blah, blah, blah to a woman creating confusion is universal. It's not only in business, but this is so many of our clients have this challenge. I want to dive right into this, Erik, and let's go to step 1. What we have and why don't we put it up on the screen? Your prospect is always asking, "So what, who cares?" What are we talking about here?



**Erik:** Well, really from a perspective of you could take this from any product or service from financial planning to my company that produces whiteboards to selling cars. I mean there are a million makes and models and I think you always have to assume competition. You always have to assume that your client is going to be talking to somebody else about an alternative service or product or a competing service or product.

When somebody asks, "So what, who cares," what they mean is really personally to me as, John Bowen, my life, my family, my needs, my concerns, why do I personally care? Not me just as a man, but me as me. That is what we're talking about is really succinctly communicating to you as John Bowen, all right. I know that you're asking me, "So what, who cares," so I really have to make sure that I address that very clearly.

**John:** Well, I see ...

**Erik:** Knowing that everybody has that question in their mind, really starts you down these next few steps because you have to assume that that's always going to be the question.

**John:** So many of us as entrepreneurs want to do, we want to talk about the features and benefits of what we do and really what we got to get focused on that person what they care about is the results. They don't care what's it mean to me? What am I going to get from results? I don't really care about all this stuff you're passionate about and so I just want know how does it affect me? With so many different messages out there and so many different alternatives it's easy to get confused. Okay, so we're getting clarity now we are looking at we're going, "Okay I got it." I know I've got to get results. The second thing is we've got to get really clear on who is the ideal client. What we are talking about here are?

**Erik:** Well, the ideal client for us for example, you start out and you say, "Well, everybody needs a whiteboard?" Or the thing that you really want to work on is who is that person and for us its entrepreneurs. Its people who are fairly successful find the \$10 million companies all the way up to major companies with major initiatives like Uber and LinkedIn and Twitter and so forth who want to really communicate and so that ... We know that our messaging has to be tailored to that person that mindset.

It's a mix of men and women typically they're 40-60 years old. The company like I said was doing anywhere between \$5 and \$20 million a year. That's my client profile that's who I am talking to. The guy who is selling a BMW is going to talking to half kind of a different ideal client than somebody who is selling a Honda Civic. You can tell that ... You can buy watching commercials, you watch Honda Civic commercials and they're sort of all targeted mainly towards college kids, younger crowd because its affordable gas mileage and so forth, but you look at the BMW commercials or the Mercedes commercials and its people who are older more successful they all about reputation, where the younger crowd is just about cheap and

get me there. Understanding who your audience is going to really help you tailor that message.

**John:** Yeah, what I always like about this too is the more we can talk directly to that person. I like to get down not only the idea of client profile, but actually to the lot of times the market use the term "Avatar," not the movie, but the "Avatar," where I'm talking with them and the more I can see a real person that I'm talking with, the more powerful it is. If the fellow entrepreneurs are what we have to all think about is who are you marketing to? I mean we got to get clear what are the results they want? Who are we marketing to? So we can get that message.

Let's go to number 3. This is actually one of my favorites because once you know who your ideal clients are then what are their big five a ... What's funny, Erik, this is something that I teach in our coaching program. One of our primary businesses is financial advisors helping them, and I might just share ... Everything we do in messaging and so on we call it the big five and so when you get 10s or 1000s of affluent clients.

Number one they want to make smart decisions about their money. Number two they want to mitigate taxes, three they go ahead and they want to take care of their errors, four make sure they're assets or wealth are protected and then five is charitable planning about two thirds want to ... have to over a million dollars of financial assets outside as entrepreneurs outside of our businesses. These things become important to us and what's so powerful is when you create that framing what happens is the clients know that you know them.

**Erik:** Exactly.

**John:** Tell me how you guys use this here?

**Erik:** Well, we use it really for our clients we're trying to help them get that message out to their clients because we have clients who are targeting their client right and so the process that we take them through is really we ask them quite specifically what are your top 5 concerns. I had an interesting exercise I thought well, all right who is ... What is one of the biggest sales I've ever made of my life and it was getting my wife to marry me, right and so ...

**John:** That's typically for all our spouses the biggest sales that we're all making here.

**Erik:** Right, exactly. I'm going to throw myself under the bus here a little bit, but back when I was dating my wife I had like the mullet, ripped up jeans; she thought I was a wreck. I said I'm giving a talking using ... This is text that I sent to her, and using you and me as an example what will your top five concerns about me when we were dating that I had to overcome, I'm a



little scared of these answers and she said, "The first one was would you embarrass me in public because you were barn material and I was raised more refined." That's her concern was I wasn't as refined as her. Would you take smaller bites when we are in public because I like to take big bites when I'm eating?

**John:** You take big bites in life, I agreed.

**Erik:** Right. Would your degree allow you to provide comfortably for your family is another one, so she was concerned would I be able to," Would I be making any money," because it was an advertising degree. "Would you leave me for somebody else," so that was a concern. Then the other one was, "If we had a daughter would she look more like you than me?"

**John:** I knew you're always good at marketing. I know you're at least good at one sale then here.

**Erik:** Right, yeah, that was the whole idea.

**John:** No, you're ...

**Erik:** On that level ... That's really creating a relationship with the people that we're trying to do business with because you can't know that or really find that information or gather that information unless there's some level of trust that you have with them that they will actually share that with you. That comes over time through experience with multiple clients and a lot of times as you go through this process who you thought was initially your target audience they identify themselves and really somebody totally different and that allows you to adjust and modify your messaging to a more specifically discuss that with them.

**John:** It really leads us to the next step because once we've identified that ... We know who ... What they care about most is themselves.

**Erik:** Yeah.

**John:** Then we go from there and we go okay then who all right your corners, we got that picture. We've now ... Through maybe anecdotal experience maybe empirical where we've done the researches and surveys and so on we got the five big concerns. Lets go to the next point which is you've got to communicate effectively how you're going to sell them these concerns? How they're going to be better off? Boy, that ... I think that's such a great point Erik. How does that play in communication?

**Erik:** Well it comes to differentiating and a lot of times people will say what are your competitors doing? What are your ... How did they overcome things? To be honest with me

and this has always been my approach. My approach has always been I'm not so concerned about what my competitors are doing. I'm more concerned about how well I'm communicating. I'm going to take care of the person I'm talking to. That will naturally take care of itself. How will you solve these concerns better than anyone else is really just the more you understand what their those concerns are, like for my wife me taking big bites in public I just had to take smaller bites.

It was through ... A lot of times you communicate this through your actions because they're going to do business with people that they know they can trust, like Joe Polish always says. A lot of times it's just not communication; it's the actions and the way that you keep commitments and the way that you're processing your communication process works the people will trust you. You can show them through action how you're going to do that better than anybody else, because at the end of the day it comes down to relationship I believe.

**John:** What I like about this too, Erik, how I've used you in this process because I think this is exactly what we do too is okay, now you've identified. I'll go back to the financial side despite concerns. What is the process you're going to do and if you can clearly articulate the process. There's so many people, financial advisors ... Many financial advisors usually they're going to take care of one.

They're just doing the investment side. They're not necessarily dealing proactively with those other issues which are very important to successful individuals. If you can clearly articulate that you have a systemic process to do this whether this systemic process to address your wife's concerns or my wife's concerns or your perspective client, you have to have that. One of the challenges is communicating that. If you can't communicate it, they don't believe you have it. If you ... They don't believe you have it, even if you have it, you don't have it. That's the reality.

**Erik:** Yeah, exactly. We actually have a process video that we have many of our prospective clients and clients watch to demonstrate and talk them through this is how we're going to take care of you very specifically from the beginning to the end. There's no open ended questions about what happens when this happen. We communicate that proactively up front.

**John:** Let me go to number 5. I think this is where so many people fall down in their marketing campaign, if they even get this far. This is like world record marketing if you do this. What it is? How will your prospect's life be better off? Whoever that ideal coin is it, if they go ahead and they work with you or how are they worse off if they don't choose you. What I just find on this, Erik is what we want to talk about is features and benefits to these marketers and what the clients want our results. How can we communicate that? Then the part I really like is if they don't take action, what are the results?

**Erik:** Yeah, that's something to add I think our friend Dean Jackson does really well. It's something that I learned from him extremely well. Dean and Joe Polish, where Dean spoke on this last event ... What is it? "Heaven, if you do, hell, if you don't." A lot of times we just talk about the heaven with clients and talking about their heaven, but we also have to pick that scab a little bit and get them to bleed a little bit and help them to understand in a financial and investment world, if they aren't great, what they've done up to this point has brought them to where they're right now.

That's a process that isn't working for them. They're living in a certain type of hell. If your product is going to change that for them, then they have to understand that life will continue that way. You're going to have the same struggles, challenges, concerns. If you don't understand how potentially things could go wrong if you don't go with us, maybe going with somebody else then there're potential road blocks and challenges that you may have there aren't going to be fun. Its understanding that heaven-if-you-do-hell-if-you-don't scenario and make sure that they're very clear; and make sure that you put them in the positions where they're not comfortable telling you.

**John:** I do love Dean Jackson, so fantastic and Dean is Joe's partner co-host in the, "I love marketing." It's a great podcast series. You can go there and get some links to Dean's Breakthrough DNA book he did with Joe and some real good insights. I love that heaven and hell because it's tempting to only do the heaven. I also see some marketers only do the hell. You got to do both. One of the processes that I found as the very, very powerful is as you think of heaven and hell, you're going to remember that most entrepreneurs as we selling things we forget how busy everyone is.

Let's take B2B sales. What we're seeing is that if you communicate the benefit, the end result excuse me the results that they're going to get, you forget to communicate that hell, they're going to ... Most of them are very successful. They don't need you that bad. When you start in the hell usually is in action that they're not doing something that they're ... Because they're become complaisant and the reality in today's market place, if you're complaisant, you're going to have lesser results over time because the competition and noise and so ...

Yeah it's ... you have no choice to do it. I'll tell you one of the biggest errors I see over and over again is the last one, not having a clear cold action. You've got somebody interested in so on and you got to take them somewhere. Erik, how do you help communicate this?

**Erik:** Well, it's almost reverse engineering. Every webpage should have a very specific goal behind a webpage. Every communication has ... It should have a very specific goal of that communication like the podcast that we have right now. The podcast that we have and that we're doing together, John is to communicate these six points. That's the purpose of the podcast; and to make sure that the people get a good education, good takeaways so that

there's value, because in marketing every part of the sales process, I like to call it a domino, I refer to our videos often times. This is a first domino in a series of dominos because the videos that we produce have a very specific purpose. We need to understand that with every client that we work with. "Okay, what do you want this video to do for you? Where is it going to be? How are they going to watch it?"

If you're a sales person, "All right, what's the goal of this conversation? Is it to get the next appointment? Is it to get a phone number? Is it to just help them absolutely clearly understand without misunderstanding our value over our competition?" I think that if everybody can start every communication with what's the goal? If it's a website, what's the goal of the website? If it's a video that you're producing, what's the goal of the video? Any communication should have some sort of action or purpose behind it that's going to drive too deepening a relationship or creating some sort of value or next step, especially, in a sales process.

**John:** This is so great, Erik. I just love ... You reduced down to six steps. As entrepreneurs we're doing this, if we go ahead and if we really think through this process, and every important communication that we have, we're going to be able to really help those people we're looking to inspire to action, to clear action. Let me ... I want to go to new segment here. Book of the day. Erik, let's go to what's the book you would recommend to your fellow entrepreneurs?

**Erik:** Yeah, the one that we're really focused on right now is a company. Actually we're doing quite a bit of work internally. It's called the *Idea-Driven Organization*, by Alan Robinson. He works at the University of Massachusetts. He is a professor there. He has written this book. He is consultant with major organizations all over the world. Basically the idea here is that you're frontline people. You're people who are interacting with your clients. You're sales people. You're people who are working on with the machines or fixing the tires whatever business you're in. They are the ones that see the detail processes being executed on a daily basis.

It's allowing them and giving them a platform to communicate ideas that they think are going to help improve the process. What you do is you break it down to three things. For us as company we break it down to process, quality control and client satisfaction. Those are our three internal top agenda items that we're always looking to improve. Every month we have the whole team get together and just start listing ideas of how they think they're going to improve the process or ideas that they think would really influence those three categories.

Everybody vote collectively on the three that they think we should implement that month. These ideas come up from the bottom instead of just the CEO controlling that incase in the business other than the larger strategy or financials making all the rules and not having that greater influence on it. You can tell it's pretty enthusiastic.

**John:** I'm going to download the book. The problem is I'm doing all these podcast, again lot of great recommendations. I really love that. I think one of the as entrepreneurs the more we can have a great team and let them really self-manage the company. You'll get these ideas. I love that process. Let's go to next one. This is the "Application of the day." Erik, you use a lot of technology. You're among technology people. What's on your Smartphone that you found that would be useful for other entrepreneurs?

**Erik:** We're very project and process oriented. This falls into our process, quality control and client satisfaction. We have from the very beginning used Basecamp, which is a project management platform. As the platform that we use to communicate with our clients to submit the rough drafts, story boards all that. That is an app that can be used on the phone. That is a very intricate part of our business. How we interact with clients. That is an app that we just love.

**John:** I'm going to say, I know you use that because lot of people will say I use this app. You guys use it well and it's really well done. Let's go to the next segment here, "Resources." I'm going to pull up your website, Erik, and how can they get a better idea what you're doing and reach out to you.

**Erik:** Yeah, the best place to go just to see who we are, what we do, the clients we've worked with, samples and videos, testimonial and so forth is just on the website, which is [thedrawshop.com](http://thedrawshop.com).

**John:** It's got some great examples. As a matter fact, what I want to do, Erik is let me pull up real quick our home page. I want to show one ... Everybody I have on ... I'm not going to have anybody on here that I'm not their believer but I have just found some real good benefit. Erik, you don't know this but we're just putting this up and we do this free consultation. This is from my financial advisor business, not the entrepreneurial.

As you go down you will notice that when we're explaining the consult data process we make available, it's a Draw Shop illustration. It's a very succinct. It's just under two-minute video. What it allows us to do is very quickly get a message out that quite honestly, Erik, I could spend five to ten minutes talking through. We got thousands of advisors appreciating you doing that.

Let me wrap this up with the last segment, which is "Key takeaways." I want to share with our fellow entrepreneurs that lot of great insights you want to go back to [aesnation.com](http://aesnation.com), we have it transcribed. You have all the show notes. I want to go over this, download. I've got the sheet here because I want to go over each of the steps, the art of being impossible to be misunderstood in the six easy steps.

The very first one I love so what? Who cares? When you're doing something every action ... You think about who cares other than you? You've going to get what are they focused on? Get clear clarity around who you want to work with? Who are those ideal clients that I avatar that you're going to be communicating with. Then from three, the big five ... Five, it can go three to seven, but I'll tell you five seems to be the number. I'm totally agreement with Erik and Summer on this. Get clarity on the concerns and then be clear on the process you're going to use. From there hell or heaven, how is it going to be. We'll use Dean's words, and then lastly be clear on the code of action. If you do this and you do this well, you're going to have huge success. Erik, I want to really thank you for sharing your insights.

**Erik:** Thank you. I appreciate it. I appreciate your time.

**John:** Well, I'm going to encourage everybody to go out there and execute. Your current clients, your future clients are counting on you, don't let them down. We wish you the best of success.

**Erik:** Thank you, John.



## A Second Opinion on Your Finances

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Why do we offer this service? Because at Financial Advisor Select, we have just one purpose: to help successful individuals and families achieve financial peace of mind by connecting them to top financial advisors in their communities. We look forward to assisting you.

Best of success,



John Bowen  
Founder and CEO  
Financial Advisor Select