



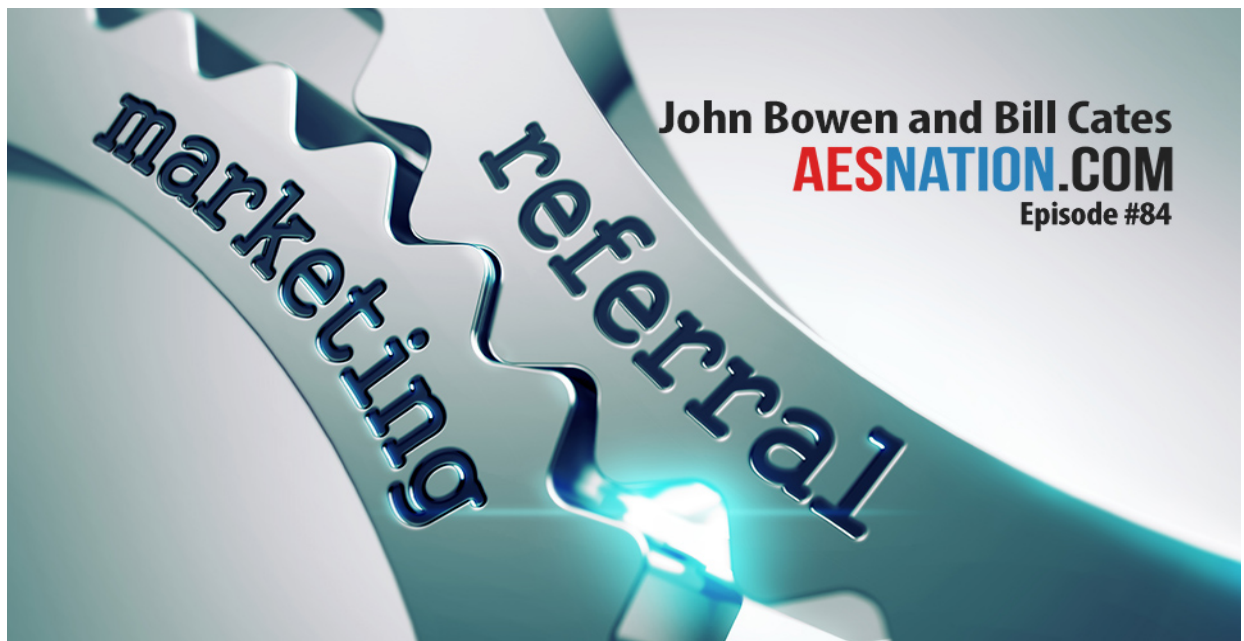
# AESNATION.COM

ACCELERATING ENTREPRENEURIAL SUCCESS PODCAST

EPIISODE  
**84**

**Bill Cates**

Show Notes at: <http://www.aesnation.com/84>



Dear Fellow Entrepreneur,

We are thrilled that you have joined us here at AES Nation, where we're dedicated to accelerating entrepreneurial success—your success.

We hope you find this transcript to be a valuable supplement to the podcast and encourage you to share it with like-minded entrepreneurs in your network.

In addition to our five-times-a-week interviews with leading entrepreneurs, keep in mind that we have plenty of other resources to help put your success on the fast track:

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- Our **virtual conferences** showcase business leaders and experts in elevating your success and your life. These one-day online events give you access to the in-depth presentations and interaction that you'd get at a live conference from the comfort of your office or home.
- The **AESNation.com weekly newsletter** will always keep you on top of the latest interviews and events. [Sign up here.](#)

Thanks for being part of the AES Nation community. We'll see you online.

Best of success,



John Bowen  
Co-founder, AES Nation

**John Bowen:** The number one challenge I hear over and over again from entrepreneurs is I'd like to have more clients and customers, the right clients and customers. Well, today, you're in for a very special treat. I have a fellow serial entrepreneur who's been out there creating value for his clients doing amazing things, but in the last 20 years he's focused on only one item.

How you can get a steady stream of clients beyond referrals? It's an amazing methodology. We're very aligned. I've known Bill for over, I think over 20 years now that he's been doing this and he's an amazing individual, you need his methodology, his strategies, his tactics and his business so that you can accelerate your success.

That's why we're here at aesnation.com. I'm John Bowen, stay tuned and your future clients are going to be glad you did.

I am so excited to have you. I've known each other, we've known each other for a long time but we haven't had a chance to really hang out together, even if it's virtual over Skype. First of all, thank you for joining us and being willing to share your extremely valuable insights with your fellow entrepreneurs.

**Bill Cates:** You bet, it's my pleasure, always good to do something for you. I respect the work you've done for many years as well.

**John:** No, we're both out there, making a difference and this is one of the reasons why we're here at aesnation.com as we share. We've been blessed. We're privileged and we want to share the experience and bring together some great entrepreneurs like yourself and Bill, I want to go into, you're known as the referral coach. I'm going to call you referral king.

You've been doing the research for an awful long time and more recently you've refrained beyond referrals. I'm very aligned and we use some of the same methodology and with our clients and it's just been huge. It's been both for our coaching clients as well as in our own business. I want to really spend some time there.

One of the parts is I want to get the back story. How do you, you got lot of discipline, stay focused on one thing for 20 years and do it really well. How did you get to where you are today?

**Bill:** Yeah. Well, we don't have time for the whole story, but I'll give you a real executive briefing. I guess I started out after college as a drummer in a rock and roll band and I toured the country for a few years and then I did an assessment of my talent and realized I'd be playing in Holiday Inn for the rest of my life, if I didn't do something differently.

Over series of events, I gotten into the book publishing business and I started and built and sold actually two book publishing companies and one was with the partner, one was on my own. The second say I was really to the partner. Then I was looking for the next thing to do and realized that my passion was to learn and grow.

I was pretty good at explaining things to people and I, that drummer part of me, a little bit of entertainment and so I realized that this world of speaking and writing and now they call it thought leadership was really suited for me and I was suited for it. Staying focused on the referral process has not been a problem for me.

Because it really, there's a lot more to it than some people think. There's some depth, there's some breadth, and I can honestly say, John, with maybe the exception of you, I don't think there's anybody else on the planet that knows more about this process than I do. I know that sounds like I'm bragging but I spent 20 years at this.

I worked with many entrepreneurs, financial advisors, small business owners, you name it. I've seen it all. I'm very passionate about it and I think we need, we need it more now than ever. I think referrals are more important now than ever before.

**John:** So much noise out there. I think I totally agree. It's relationship business. We're all becoming more alienated, depending on what study you believe. There is as many as 4000 marketing messages, the average successful individual gets every day.

**Bill:** Right.

**John:** Some days it feels like even more. It's not that we're, we see them, we recognize everyone but we're flooded and to do that. When we get that introduction in a referral, from someone that we trust. It's invaluable. Let me start ...

**Bill:** Cuts through all the noise, doesn't it?

**John:** Yeah. It does. It's so appreciated too. Let's start, Bill really with how you think about it and you've given me a couple bullets I want to walk you through. The very first one is your referral mindset. So much of life has mindset, no matter what we do. In relationship, boy this is really important.

How does this come together?

**Bill:** Yeah. I call it having a referral brain. It's, some people are born with it naturally, some people have to learn it. There's a lot to it, but I'll give you a couple nuggets real quick. First of

all, it's making the decision to build a business based on how people want to meet you rather than having referrals be an after thought icing on a cake. They are the cake.

The way of the world is meeting people through other people and the referral is that one way we get into their life, these days of course I've been using the word introduction which we'll get to a little bit later. Building a business based on that. Let me give you an example of making sure that we tap into the full lifetime value of a client or a customer.

Many of your folks who follow you will be familiar with the concept called NPS net promoter score, it's essentially, it's a client or customer service measurement that says are you willing to refer that business? Are you willing to recommend that business? That's a good question to ask.

Obviously that's a good sign of customer client satisfaction. All these businesses are working really hard to increase their net promoter scores, are we getting eights and nines in our NPS, there's a book written called the ultimate question. It's a very good book and it's a must read. Yet I would say that it's not the ultimate question.

The ultimate question is not are they willing to refer you? The ultimate question is, are they doing it? Are you getting connected from your customers or clients? Do you have processes and programs in place to encourage and make sure it happens rather than leave it to chance. Most people leave this to chance.

Having a process and being really committed rather than dabbling in the referral process. We've helped, I just spoke for a group. We helped them increase their referral business by 500% over the last year, just by putting the right focus on it. What you put your attention on grow stronger in your life.

Keeping the score raised as a score. All these little expressions that I like to use. It's just about focus and having a few systems in place.

**John:** No, I think this is so critical what you're sharing, Bill. Because when I, a fellow entrepreneur, Dan Sullivan, Strategic Coach. Dan, I joined his program about four years ago and quite honestly, I was not in my new businesses, when I was in financial services, and providing services we were extremely systemic referrals and introductions.

Then in our new business, the CEG, the coaching side, not the entrepreneurial side. We've been doing it for about 10 years, or not quite 10 at that point in. Ask Dan, growing his business, what was most important and over half his business was referral, he shared with me the systems he was doing. We, that just immediately, boy, how could I have ever missed that, a duh moment.

**Bill:** I'm sorry, could I let you in on a little secret?

**John:** Sure.

**Bill:** I know, Dan. I did his program and Dan used my video training program to train his sales staff in how to get proficient with referrals.

**John:** Well, he's executed in and I can tell you now. I didn't know, you helped me on this too, Bill. Right now we're not quite at 50% of our new business coming in is through, I use a term as you do, introductions. It's all about results and creating the system. The first thing is you got to have the mindset that there is going to be the system in this experience you're going to deliver.

**Bill:** Right.

**John:** Let's take in the next step. One of the, people get so frustrated they don't get referrals. You call it enhancing their referrability. Some people aren't very referrable. How do we enhance our ability? We don't. I think about it, they don't deliver great experience. I've had some car dealers jump into my mind as I say. Well, they're not going to be very high on the referrability scale.

How do our fellow entrepreneurs? As they're listening to this on the audio podcast or if they're watching on the videos. How do they become more referrable and enhance that?

**Bill:** Right. Believe it or not, I've helped car dealers increase their referrals. I have ongoing video program for one of their big channels. I've helped bankers, I've helped pest control folks and one of my big niches of course is financial services, just worked with a bank yesterday, work with financial advisors all over the world.

Going to India, this next week, to speak to a thousand financial professionals there. I want to say something that may surprise people. Sounds a little counter-intuitive, but it's true. That is that most satisfied clients do not give referrals. Here we have all these attention on satisfied clients, loyal clients and I'm not saying that's misplaced attention.

Of course we want satisfied clients. Of course we want loyal clients. However, that in and of itself is not enough to drive the type of referral business that most people want. What's the next level? Well, research shows that the next level is what we like to call an engaged client. Julie Littlechild with Advisor Impact in Toronto has done some wonderful research in this area, as I know you guys have as well. It's the engaged client. When the client feels engaged with

the rep, with the company, with the firm and I have a hierarchy of engagement, we could go through a little bit.

That's what it takes. In her study, 20% of satisfied clients while they were very loyal, only 20% gave referrals in the proceeding 12 months. However, of engaged clients 98% of them gave one or more referral in the previous 12 months. How do we create those engaged clients? That's the hierarchy, that's the experience. If you don't mind, I wouldn't mind running through it.

**John:** Yeah. We have that research too on our side. We've surveyed, I think we've surveyed over 30,000 financial advisors and probably 20,000 affluent individuals with over a million in financial assets. We used a little different terminology but it's really when they've emotionally connected with that person, they have a vested interest.

They, not only have you differentiated yourself, but you're distinctive, they really, they want to share you. How do you help our fellow entrepreneurs get to that point to be able to enhance that referrability?

**Bill:** Yeah. I know that there are a lot of financial professionals watching this, and there are many other types of businesses represented too. This really cuts through any kind of business. It might be adjusted a little bit here and there, but it's pretty much the same thing. The first level of this hierarchy is having an initial process that's referrable.

In other words, bringing sets of valuable initial process to your new prospect, not just trying to make the sale, bring them on as a client but actually create value in a lot of different ways, through the questions you ask, through the things you teach them and having an onboarding process that that becomes referrable.

That you're getting referrals without even asking because that starts the engagement. Here's the good news. Is that it doesn't necessarily take a long time to create this feeling of engagement.

For instance, here's one thing that anyone can do very quick on a relationship that builds the engagement, that is talk about what the future of the relationship is going to look like? How you're going to stay in touch? How many times you're going to meet for business purposes? Whether you're going to go break bread? The golf, charity golf outing that you do in the summer, et cetera.

Lay that out, show them your client promise. What happens is that they start to feel that sense of engagement before you actually even do that for them and so they're feeling that. Then a

great question you can ask them, by the way how does this compare to who you working within the past?

If you have a good process in place, they're going to say this is head and shoulders above that. That's level one. Having a referrable process if you will. The next level will be responsive service. Now everyone says they give responsive service, most people do, it's table stakes, it's what it takes to be in the game and if you're not giving responsive service, you're history.

That in and of itself does not distinguish you. It does not necessarily increase your referrability, not having it will decrease your referrability but you got to have it to stay in the game, keep the business. All right. What's above that? Well, continuing to add value. We have to keep bringing value, otherwise we're no longer necessary. This is true for any business.

Now some businesses lend themselves to that more easily by the nature of the work they do but we got to make sure I have a process or a system in place to do that. Now why do people give referrals? Because they saw the value in the work you did. They may, they could like you and think you're cool but if they don't see the value, they're not going to give you referrals.

That's pretty fundamental. Next level is what we call business friendship where you do start to create that sense of something more than just the core work that you do together. If someone comes to visit with you. Don't just walk them to the elevator or the door, walk them to their car.

When you get outside the building, all of a sudden, the conversation changes, and client appreciation events, and celebration events. I could tell you great stories of how to do celebration events for your clients. You build that business friendship but we're not done yet. The final level is what I call opening the curtain.

This is when we have now earn the right to talk to our clients, our customers about trying to bring our value to other people. What it would look like? How we would handle if they thought of someone? Who we're trying to serve? People much like you. Educating them a little bit about your business, sharing your vision of your business. Always going to the statement and what that means to you or what that would look like for you or how that relates to you.

When you talk about your vision, but you always do it back and how it, what it means to them, a client-centric way to talk about your vision. When you put those five things into the process, now you've got true client engagement. As I found also as you go up the ladder of engagement, you also go up the ladder of advocacy.

These people as they see your value and then build the business friendship and then know who you're trying to serve and why and the passion you feel for the work you do. Now they



become your advocates and they know how to be your advocates, that's important. Not only that they want to be, that they're willing to...

**John:** Now, this is so good, Bill. I'm going to tell everybody to remember that we, all this is transcribed. If you couldn't take the notes as quickly, the show notes, and then we have a full transcription, you can get it at [aesnation.com](http://www.aesnation.com). Because Bill, what I'm hearing from you and I see it over and over again in what we're doing.

This is just so important and they can make the, they really go ahead and do the build that relationship so that now all of a sudden they've connected and as they connected. What they have is they really want to go ahead and share you that experience they're having with you with the people they care about.

That's where this takes off, and on the go-to, the kind of the next step that you have which is promoting referrals, because I mean we're now, we got the mindset, we've laid a great client experience. We were there. How do we start bringing this so that it's in action because we're all about results?

**Bill:** Right. You need to be referrable and you need to be appropriately proactive and there's two ways to be proactive. One is to promote referrals or introductions. Actually John, let's stop for a second, just say referrals are irrelevant. Referrals are worthless unless what? Unless you turn them in introductions and set the appointment and create a new client.

We're not talking about referrals or introductions for referral's sake. We're talking about a process that leads to the new client and the right kind of client. What is promoting referrals? Sometimes I refer to it as planting referral seeds. It's things we can say early and throughout a relationship with a client, even a prospect sometimes.

That just brings it up in conversation a little bit. It does a few things. First of all, some of the ways that I teach to promote referrals, very often turn the referrals right on the spot. You have someone that's seeing the value. All you have to do is just nudge the process just a little bit and they open up.

In some cases, it goes into their unconscious, then later they're having a conversation around the value that you provide, and then they think of you and that planting that seed, that promotion kicks in. Also a third thing it does is it, it access the barometer of their relationship to the referral process.

For instance, if I said "Hey, John. Just make sure, I'm never too busy to see if I can be a resource for other people you care about." How you respond to that could give me an indicator

as to whether you're open to it, you may say "Oh great, absolutely." We definitely going to keep you in mind.

You may say "Well, you know we're pretty private but I appreciate that." How a client responds to that planting of the seed or promoting will give you an indicator where to go next. Now this is not to be confused with asking for referrals. This is promoting, this is creating possible introductions.

Definitely creating word of mouth. This is where social media comes into play where, I know financial advisors can't do Twitter much or Facebook much. They can but it's guided by the clients.

**John:** A lot of the regulatory things plus hitting Twitter 15 times a day can get a little old.

**Bill:** Yeah. Your clients are on Facebook, your clients are on Twitter, your clients are on LinkedIn. When they have an experience that they like and you may be nudged the process, then they'll do it, and they'll do it plenty. I know many advisors, other business people got business recommendations based on someone sending out a Tweet or a Facebook post.

I'll give you my classic planting seed promoting referrals. I gave you one. I'm never too busy. That's pretty common place. Here's what I've been teaching forever, it's a title of one of my books and I didn't make up the process but I've been popularizing it quite a bit. It's simple, don't keep my a secret.

Don't keep my a secret. If a client says "Hey, you've done a great job, first break. Please don't keep me a secret. Don't keep us a secret or don't keep the work we do a secret." I have seen so many people get referrals without even asking just from this little thing. Now to say don't keep me a secret, there's a little smile on the end of that, isn't there?

It's a fun thing to say. If you don't have a sense of humor, don't use that one. I have others for you. The beautiful thing is that it creates that smile and whenever you can have fun in this process, it makes everything easier.

**John:** Yeah. It's really, it is a great line and it's a great framing and now let's go. One of the things again about results here. Another point for is asking for referrals. We've gone ahead. We've got the mindset. We've positioned our client experiences. We've been laying in the seeds. How do we make sure this happens systemically?

**Bill:** Right. Well, I have a lower process I call the VIPS method. I'll go through it very quickly. V stands for value discussion, without question this is the most important thing I talk about is

that checking in, checking in with the prospect, checking in with the client to make sure that they see the value in the meeting, in the process, in a relationship.

It's not a close-ended question setup. It's not have you found value in this process, yeah. Great, who do you know? No. It really is a discussion. Even if you don't go any further, just to check in more often and this will create referrals without even asking, that's the V. The I is treat request with importance.

Come from a place of confidence. Come from a place of believing in the work that you do. We're trying to serve others. P is permission to brainstorm or explore. It's a collaborative process but there's no pressure to it. Brainstorm, collaborative, no pressure. As the suggest names in categories.

We're always more effective when we come to the table with a possibility of who we might suggest. I just took a call right before we got on with recording this from a very successful advisor. I've been coaching him for 10 years. He has a \$5 million practice. He has \$600 million of investible assets under management.

He has a meeting coming up with a guy next week and he says how do I? Where do I suggest names? I picked up this information on LinkedIn. How do I bring it into the conversation with the guy, not thinking I was stalking him. We work through that and we strategize on his best approach.

That was natural and authentic for him. That's how I want to end this VIPS thing, is that it's got to be natural and authentic. Now with that said and maybe a step out of your comfort zone if you haven't been doing it, but if you do it enough and practice a little bit, it's no longer a step out of your comfort zone, it just is for a little while.

**John:** Yeah. One of the success happens when you leave that comfort zone. You don't have to go too far out but go a little out, stretch yourself. I bring up a tool all this year. I don't know if you've run into it, Bill. It's fairly new, Refresh.

**Bill:** I've heard of it, I have not seen it yet.

**John:** Yeah. You said ... The reason why I like it for all our fellow entrepreneurs. You can use it as an app, you can use it on the browser, but where it's really powerful is it creates a dozier. Every morning I get a report and I've got a report on your, Bill, all the connections and if we didn't know each other, how we could start the conversation and start. I've actually used that to print out, to share with someone because it will show all the connections through our various relationships on social media. It's a great conversational piece as well.

**Bill:** If you have an engaged relationship then you can be transparent, it's not a problem.

**John:** Well, yeah. No, I think that's the biggest part is that you've got to lay the foundation that you've done, the mindset, enhancing the referrable. You deliver a great client experience. That means that you're transparent, you're authentic, and that you're planting the seeds and then just doing those, and you could do it in a way of sharing this as a tool if it's applicable in your business.

Share this as a tool and it's like, I want to see ... Let me see, because it is interesting when you look at your report on what comes up and it's free. Now...

**Bill:** Have fun with that, because here's what you can do, you could say look I've identified a few folks and gosh if you were me, who would you avoid on this list? What happens? They laugh. They smile, definitely.

**John:** That's a great line. Because at a close look here, because there's probably a lot.

Let's go. Let's take the fifth step which is one of the things is all of a sudden, you get excited. They're giving ... Bill, you should meet with Joe and Harry. Okay. Well, great. Okay. Well, how do we take it from there? How do we go ahead and secure the introductions to really make sure that this all happens?

**Bill:** Yeah. Hence the title of my latest book beyond referrals. Right. We've got to go beyond referrals to the introduction and of course beyond to the new client. Think of creating the introduction like this. The food and drug administration when it's evaluating a drug for the market, it's looking for two things.

Is the drug safe and is the drug effective? That's needs to be I believe our mindset, our approach to getting introduced. Meaning we want this introduction to feel safe, to feel comfortable to the person giving the referral to person receiving it. The new prospect. They need to feel comfortable on this process.

It needs to be effective. It could be as simple as. John, let's talk a little bit about your friends. Let's see if we can come up with an approach. That number one, feels comfortable to you and to them. Obviously, I like to pique their attention just enough so they'd be willing to have that 10 minute phone conversation with me like when I started.

That's it and then we think through it. We figure it out and here's where I found. Just by talking through this introduction a little bit, just getting a sense that they appreciate that you want to

do it in a comfortable way. Then they start to take a stake in it. They start to get invested in making sure it goes through.

Rather than having these referrals that fall through the cracks. We actually have someone giving us referrals, making an introduction and they want to make sure it goes through. They want to make sure we get connected, then we go from there. They've done their job but it is their job to help with the connection.

If they believe in the work we do, and if they believe their friend, family, colleagues would also benefit.

**John:** Well, in the process you've done. I got to tell you, Bill. We do something similar to this and it's not as robust as yours, it works. What happens I want to share you then. They need some guidance on how to share. You can't just leave it. Let me go to the next segment because this leads into it and it's the book of the day.

What I'd like to do is let me bring up on screen your latest book because this is people who want to go beyond this podcast and insights can go to your book beyond referrals, how to use the perpetual revenues system, I just love that, to convert referrals into high value clients. Bill, what are they going to find in the book?

**Bill:** Well, they're going to find the perpetual revenue system, I didn't create this dynamic, I gave a name to it. It's really quite simple. It is be referrable, serve your clients, your customers well, you become referrable. You get referrals without asking or you're proactive. You get the referral now, what, you turn it into an introduction. You get connected.

Now well you get to set the appointment whether it's on the phone or in person. Some way you got to talk to this new prospect of yours. Then ultimately, you want to turn a new prospect. If it's a win-win into a client. Those are the four steps. Now, when you have this new client, what happens?

Well, you serve them well, you create a good experience to become referrable, and so it's perpetual but here's the kicker. The beautiful thing about this is that since clients or customers can give us more than one referral and introduction over time, then not only does it grow the business literally, it grows it exponentially.

By having this process in place, it mushrooms. Since clients who come into a business are about two and a half times more likely through a referral, about two and a half times more likely to give a referral. Over time when this becomes your primary driver, it gets easier and easier and expands faster and faster because...

**John:** Well, the lifetime client value. One of the things all of us as entrepreneurs want to do is we want to deliver a lot of value to our clients.

Well, sometimes our pricing, just the initial pricing isn't enough to deliver a lot of value, but if you are able to put your practices into place, that's beyond referrals, all of a sudden the lifetime value of every single client becomes so significant. Because of all the people that they're going to introduce you to, it's an amazing.

**Bill:** Part of back to the referral brain, it's understanding that the lifetime value of a client or a customer isn't just the business they can do with you over a lifetime, which is great, substantial, we want to get it, we want to serve them. It's also who they can introduce you to over a lifetime if you have some mechanisms in place to facilitate that process.

**John:** That's great. Let's go to the next segment, applications, application of the day. Bill, you and I both do a little bit of travel and along the way. On your smartphone, what do you recommend to your fellow entrepreneurs?

**Bill:** Yeah. It's funny, John, when you ask me about this and I was thinking about it. Other than watch ESPN so I could, and now watch BTN and my Maryland Terrapins have moved to the Big Ten so I'm watching the Big Ten Network. Other than those two apps, it'd be flight track. It's, because I'm on a plane or I'm on the ground and I want to know is my light on time, is my next flight on time.

If I miss that flight, what's next? What's in line? Just in case. I probably look at Flight Track about more than anything except for maybe the weather.

**John:** No, when you're sitting at the airport, it's easy to get concerned that the flights are going to be on-time. I'm sure, you're like me, we can make quick changes along the way. Let me go to the next segment, which is resources. Bill, tell me about what you have available on your website?

**Bill:** Sure. I appreciate. It's referralcoach.com. We serve different types of individuals and businesses. We can serve an individual financial advisor and individual professional and individual small business solopreneur. We certainly have tools for that in terms of video and we have a referral coach academy which his online and books, and all of those things you might expect.

Then we also serve the level of the corporate office, the home office and many companies, or large companies in fact will bring us in to educate their field force. If you go to referralcoach.com. You can enter what makes sense for you. Whether it's the individual portion or the corporate portion.

Check out our store. I really do encourage you to look at our referral coach academy because it is a state of art way of training. There's nothing else out there like it. You'll love the little demo video, because you've never seen anything like that before it's very interactive. I don't want to promote too much.

**John:** No, well, let me come on a little bit. Because there's a lot of value there and then Bill you offered, I'm going to, we'll put it in a link on the notes, the [aesnation.com](http://www.aesnation.com). The [referralcoach.com/reports](http://referralcoach.com/reports). Let me put it up on screen and there's all kinds. This is just invaluable. Bill is making available to you. Take him up on the offer.

This to me, this whole concept can easily grow your business 20% a year, and that, if you want to be a successful entrepreneur, you need to grow 20 to 40% to attract the right clients, to have build the right team. If you're looking at accelerating success.

**Bill:** No question. I've done it many times.

**John:** Yeah. I have as well. Let me go to the key takeaways. I might just go over. To me there, your five key takeaways. Number one, you got to have a referral mindset. You really have to be thinking this. You want to think big picture. You want to go buy Bill's book beyond referrals, you want to go over to, play the podcast again, look at the show notes.

You got to have that mindset. Second, to me the number one thing is you got to nail that client experience. You've got to build it out. You've got to be referrable. Third is you've got to lay the little seeds as Bill is talking about and being authentic and genuine and letting them know why you are the right one for their friends or business associates.

Whatever type of business you're in that they should want to introduce you. Then you need to ask. You got to put it in motion and really if you've done a great job like Bill suggest. You really, it's not asking, it's offering them to share you with the people they care about, that share that experience.

The last is, that none of this works unless you secured introductions. You're going to be amazed how well they are going to promote you but also make it happen through securing introductions. Okay. With that, Bill, let me thank you again. This has been so valuable to our [aesnation](http://aesnation.com) mastermind group and want to encourage everyone out there to go out.

This is so important for your existing clients because if you're referrable, they want to share you and all those future clients are counting on you, so don't let them down. We wish you the best of success.

## A Second Opinion on Your Finances

*A Complimentary Service from Financial Advisor Select for the Members of AES Nation*

Dear Fellow Entrepreneur,

Like many members of AESNation, I'm a serial entrepreneur. In addition to co-founding AESNation, I'm the founder and CEO of Financial Advisor Select, a firm dedicated to helping successful people make informed financial decisions by introducing them to top financial advisors.

If you're like many successful entrepreneurs, you and your family already have a relationship with a financial advisor. You may even work with several financial advisors. If you are completely satisfied with these relationships and confident that your finances are on track toward helping you achieve all that is most important to you, we congratulate you.

However, you may not be entirely satisfied. You may be wondering if there's a financial advisor who is better-suited to address your family's very specific financial challenges. If so, you are not alone. In today's uncertain economic climate, many successful entrepreneurs are wondering if they have the right financial advisor.

To help you find out if you are currently being served well, Financial Advisor Select is offering a complimentary second-opinion service to all qualified members of AES Nation. Simply [contact us](#) to schedule an exploratory call with one of our personal financial concierges. We will introduce you to a financial advisor who we believe has the ability to address your particular needs. The financial advisor will then meet with you and provide you with a second opinion on your finances. There is absolutely no cost or obligation to you.

[Find out more about how Financial Advisor Select can help you and your family.](#)

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