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ACCELERATING ENTREPRENEURIAL SUCCESS PODCAST

EPISODE **104** **John Evans**  
Show Notes at: <http://www.aesnation.com/104>



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Best of success,



John Bowen  
Co-founder, AES Nation

**John Bowen:** I am so excited to be here with you today. As entrepreneurs we're all trying to make a difference. At AES Nation we're focused on five areas we see the most successful entrepreneurs really deliver value. Number one client experience; we see it over and over again. That's a big differentiation. Two, the ability to scale up to attract the right clients by delivering this experience. Third is going ahead and putting the technology systems in place. Fourth is going ahead and monetizing; not only having your business create tremendous value for your clients, your customers, but also maximizing the value that you do. That's the great thing about capital markets is that that's how we create value and we can do exceptionally well by doing it as well as building that personal wealth. The last is a great quality of life.

Those are the big five that we're focused on and I've got to tell you I have a remarkable individual. He's a very good friend of mine. We've known each other for an awful long time, comes from the financial services industry and he is out there making a huge difference. I've asked John Evans; he's the Executive Director at Janus Labs to join us because not only does he have a new book and the book is called "WOW 2.0" and I want to talk about that but he is doing all kinds of research.

He's working in the Doctoral program at Pepperdine and he's studying the factors. This is really important. The factors of deep client loyalty in a world that all of us as entrepreneurs are finding ourselves becoming more commoditized. How can we build that loyalty so that we can really accelerate our success? I'm John Bowen. We're at aesnation.com. Stay tuned, you do not want to miss this.

John it is great to have you on as a guest here at AES Nation.

**John Evans:** John Bowen it's great to see you. Thanks for having me on the show. I've been looking forward to this. You look very well my friend.

**John B:** Well you do as well. We're making a difference in the world. We're having a lot of fun doing it and I'd like to believe both of us are creating a lot of wow out there. I want to go, normally I dive right into the back story but I want to go ... people have heard wow and client experience. What's your definition of wow because this is going to set the stage not only for a great experience; to have an even better experience so that every entrepreneur listening to us can have a better experience for their clients but that's going to generate all kinds of additional things that we're going to talk about and how they can really get phenomenal results. I want to just start with what's the definition of wow John?

**John E:** That's a great question John Bowen. It all starts with this idea can we expand our capacity for delivering wow experiences? That's my central message to your audience today John Bowen. Can we expand our capacity like a muscle, building a muscle for delivering wow

experiences? We at Janus Labs we define wow as a unique emotionally engaging experience that goes beyond expectations and is readily recounted.

The key two words there John, the key two words are the last two readily recounted. We want to get your clients and your prospects talking about you, telling stories about you. What does Bonnie Raitt sing about? Give them something to talk about right John? That's what we want to do and that's what wow is all about. This is not rocket science. It's not stochastic calculus. We are not assessing negative convexity levels in our bond portfolios for goodness sakes, but this can be brilliant. When we hit the mark and expand that capacity for wow we get talked about in our communities.

**John B:** Yeah and as entrepreneurs we all know if we can have our story precede us and really our clients sharing what we do that is distinctive from everyone else that we compete with whether we're financial services, whether we're professional services, whether we're building widgets. This is so important John. John you know this is a journey since I've known you you've been on both first as a financial advisor now as an executive leading Janus Lab. You know, how did you kind of, give me a little back story of how this wow stuff came about.

**John E:** Yeah I will John. Thanks for that question. It was several years ago and I was tasked with leading a considerable meeting in Denver at Janus and I had to give a presentation on the five star client experience. Quite candidly John the presentation fell short. I mean it stunk. I knew I was going up on stage in 48 hours and I was panicked John Bowen. I was panicked. I reached out for some help. I reached out to a gentleman by the name of Joseph Michelli, Ph.D who's written a number of bestselling books on client experience including books on Zappo's, on Starbucks, on the Ritz Carlton. He and I went to work on putting together a curriculum called The Art of Wow.

Not so long after that John I was in Southern California and I was presenting The Art of Wow for a team lead by Tetsu Tanimoto and I think you know of Tetsu; one of the world's great people. First generation American from Japan, has an extraordinarily successful business in Southern California, and he has me teaching the Art of Wow to his philanthropic executives, his centers of influence. The folks that can really make a difference with the trajectory of his team's practice.

I'm telling a story John about how one of my passions is coaching Little League back here in Winter Park, Florida. I just love coaching Little League and I love getting the kids together and I have one of the kids write the word fundamentals down in the dirt. I have another one of the kids underline the first three letters of the word fundamentals and the light bulb goes off and these kids all explode. I also mentioned how I loved John Bow, I do love John Bowen. John Wooden, John Wooden the legendary basketball coach at UCLA.

As soon as I articulated John Wooden's name John Bowen, Tetsu Tanimoto stopped the meeting and it was very peculiar behavior. We're at a resplendent country club John. He's the client so we do what he wants and he picked up his cell phone John and he dialed a number and he got a voice mail. Everybody in the room could hear, all twenty-five and he said, "Hi Coach Wooden. It's Tetsu calling. I have a gentleman here who wants to tell you about his Little League team back in Winter Park, Florida. Please call John Evans at 407 and he repeats my number. Okay, ladies and gentlemen wow.

This is a wow experience, right and how do we know it's a wow experience John Bowen? Because I'm telling you about it and I'm yelling at you over Skype right now. I'll tell this story all the while and what am I doing? I'm burnishing the reputation of whom? Of the Tanimoto Team. I'm burnishing that reputation with a story and it's heartfelt and sincere and it was a lot of fun. By the way I'm going to do whatever I can to help Tetsu and his team led by Marcus now doing a fabulous job down in Southern California.

**John B:** It is, it's amazing when you look at this and when we start doing, delivering wow experience or we have it done to us. In today's world I mean let's face it so many experiences, client experiences, customer experiences are bad. You know it doesn't take that much to have it be good, but having that little extra element, picking up the cell phone and making that call, this is where it becomes really amazing.

As entrepreneurs we all have a client experience. You wouldn't be listening in at this podcast or watching it if you didn't already have a client experience and you're really delivering value. How can we make it even better to wow and a term you use; I loved when I was reading the book was "growth by appreciation" John. Tell me and our fellow entrepreneurs this whole concept of wowing. It takes a little extra effort to do this-

**John E:** It does.

**John B:** -and what are the benefits of doing this?

**John E:** Yeah. That's right and we learned the hard way the benefits John. As entrepreneurs on the street, that shoe gum salesman you and I, we've learned that wow accomplishes three things. First it's going to serve to concretize. Make concrete these relationships especially with those clients who matter the most. You know we all know that 10% of the clients are driving 90% of the business. We want to make sure we're building a moat, a moat around each one of those individuals out of the 10% tranche. That's number one.

Number two what wow serves to do is replicate our best clients because we get they're talking about us, right? They're talking about us and that is very exciting because I want all your listeners John to build the ideal book of their dreams, to populate their client base with clients

who truly enliven and energize the practice. That is the dream. That is the dream, but number three I think is actually the most interesting John. This goes to point number five for you with quality of life.

We've all heard that culture is not the main thing in business. Culture is the only thing or the other line is culture eats strategy for lunch, right? Culture eats strategy for lunch. Well the central question is how do we get to a high quality culture with our professional services team or our entrepreneurial endeavor? I submit ladies and gentlemen unequivocally that when we habituate wow or we operationalize wow and I'm asking all the listeners, what I'm asking for is eight more wows over the course of the next eight weeks. That's just one wow per week Mr. Bowen. I'm not asking that much.

What happens is something very curious. Again this is what I'm doing my dissertation on at Pepperdine; is we create an upward spiral of positivity. An upward spiral of positivity within our team's culture. I think that is tremendously valuable because remember most of us, we're not making widgets. We're making relationships. We're not making widgets. Post World War II our country exploded right? We just grew voluminously and we made things. We made widgets. We made cars and appliances. Now where things are much more relational oriented, relationally oriented, we need different inputs John and I submit that wow and I'll talk about some of the habits and rituals I want you to put in place. That is going to effect. It's going to bring about a really high quality culture.

**John B:** What I love about it is even if you're not kind of ... You know I'm in Northern California where it can be a little fuzzy. Silicon Valley, the cultural things and so on but what it does is it gets the results and that's what we're looking to do is getting the results, serving our clients well and really having them help launch what you call the circle of wow. You have four steps and I want you to work us through the four steps John. The first one you call evaluate, finding your super niche or I guess we're global here so I guess niche as well.

**John E:** Let's go with niche. Yeah. So sophisticated John.

**John B:** Tell me why this is so important to find who you can best serve, who you want to be a hero to.

**John E:** That's right. For whom are you going to be a hero? Let's get clear again on how we want to populate the practice. Let's evaluate step one as you suggested John. Let's evaluate what's going on with the practice now. What is our tribe? I call it a unique business tribe. What is your UBT? These are clients that not only pay you handsomely and fairly, but they also serve to energize your practice. You and I are great fans of Dr. Jim Loehr at the Human Performance Institute and he talks about his pioneering research on energy management is so critical. My question is who or what is getting our best energy as an entrepreneur and are

you okay with that? Let's evaluate that, all right? Who do we want to serve? That's number two, is we want to act on it.

When we deliver a wow experience, I'm going to go back to my example with Marcus Tanimoto. He delivered a wow experience to me and how ironic by the way, Mr. Bowen, right? There I am teaching wow and he wows me and why and how? Because he has a mindset for wow. He has an awareness. He's practiced and he's activated me and what do I want to do? I want to help him back. I want to help him back. It's called the law of reciprocity and we see it in the scholarly work in spades. It's very compelling when you deliver an authentic, a sincere wow the party wants to help you back.

You know what you do? You replicate. That's the next step. When you've delivered that wow experience and Robert Cialdini has wonderful research on this at Arizona State. Wonderful research. You've created a magic ether in the relationship. Don't just do the back slap. Ask for advice on how to grow the business with other great clients just like you. Don't ask for a referral. I'm on the record Mr. Bowen. Never ask for a referral. Instead, instead ask for advice.

One last thought here John before we get into perpetuate. The advice of the wise is like the life giving fountain. That's from King Solomon. The advice of the wise is like the life giving fountain. Your raving fans want to help you. The future of your business is in the imagination of those best clients. The imaginations of your best clients.

**John B:** This is great John and one of the things I want to dive a little deeper in each of these too as we go through evaluating and really getting clear on who it is that you can best serve. I always look at it as kind of three circles I would bring together if I could graphically do it now. You've got, what are you passionate about, who do you want to be a hero to, and then you've got to have a business model to monetize that but it's the intersection of all three no matter what type of entrepreneur you are. If you can do that this is so powerful because we can't serve everyone.

John we talked about the study you're doing in this commoditized world. Well if you try to be all things to everyone you are about as commoditized as you can get. The more you can specialize, the more powerful. Then on the activate, I want to go in a little deeper here because you talk about ... Well you gave the example. I think it's a great one. One of the best ways of wowing is connecting people. I mean there's huge value in relationships.

What I really like is what you're doing in activating is your identifying and wowing what you call CMOs. I was reading the book and I'm going, jeez I wonder why he's talking about chief marketing officers, and you weren't. Tell us a little bit about what these client marketing officers, how you activate them in any entrepreneurial practice?

**John E:** Yeah, I've got to tell you I just have to tell this story John about my friend Jason who runs an extraordinary entrepreneurial enterprise here in central Florida. Jason went through this whole wow audit program. He decided in earnest to commit to the curriculum. What he was doing in a best practice I'm going to recommend is sitting down and having a wow audit session once a week even if it's just for 20 minutes. You identify two, or three or four; not more than four individuals to whom you want to deliver a wow. They are getting clear. They are evaluating on to whom they want to deliver a wow.

One of the individuals is Fred. Now Fred is a retired firefighter from Philadelphia. He's been fighting fires for 30, 35 years. He's moving down to Florida and Jason wants to win him over as a client. They talk through the passions and interests of Fred, his emotional dynamics and personality type. All really important inputs on wow John. One of the assistants of Jason says just kind of parenthetically; you know I think my brother-in-law works over the stadium in Clearwater where the Philadelphia Phillies train for spring training in March. I'm going to check on that.

Here we are in March over in Clearwater. Jason is sitting in row two with Fred his prospect John. They're sitting in row two at the Philadelphia Phillies game in Clearwater. Spring training, there's 6,000 people there. Suddenly and dramatically an official comes up to Fred and says, "Are you Fred?" Fred responds by saying, "Maybe. Am I in trouble?" "No you're not Fred but I need you to come with me." "Where are we going?" "Well we're going down the field. How's your arm feel?" Fred is throwing out the first pitch John Bowen at the Phillies game okay, in front of 6,000 people. His name is broadcast over the stadium.

John, is there anybody on planet Earth that Fred is not telling that story too, right? No, there's not one reason to tell that over and over, but it started with the creativity. John that's what I'm really interested in. The expression we have in Janus Labs called interpersonal alpha. Alpha is the expression we know in financial services meaning you're outperforming your benchmark. I want your listeners to outperform interpersonally, to connect meaningfully and emotionally. Guy Kawasaki talks about pursuing meaning in a commoditized world.

That's what we're after here and that's what happened with Fred. As he's throwing, he'll tell you, a perfect strike and the crowd goes crazy at a Phillies game, now he has helped Jason. He's, going back to your point, a chief marketing officer or a chief clientologist pick your nomenclature. Fred is growing the business for Jason. Fred is growing the business for Jason. That's the takeaway.

**John B:** This is we all as entrepreneurs have the ability to make these kind of connections and these special moments because there's no question he's going to be telling that story until the day he's no longer with us in the world. That's a big deal.



**John E:** Right.

**John B:** The ability and my guess was it wasn't extremely hard to put that together and it wasn't overly expensive and the value created by doing this is just huge. We go and we're going to evaluate the market we want to play with. We're going to go ahead and activate these top clients, that 10% let's say. They are going to be really phenomenal but then I love the third part that you go as to replicate clients. This is something we teach in our coaching. We've seen so many businesses grow just 20% per year just by doing this. You call it curating the ideal client. Tell us how that works John.

**John E:** Yeah, so let's go back to Fred I mean because it's just so much fun to talk about. Fred is now hell-bent John for lack of a better word on replicating himself unwittingly on behalf of Jason. He wants to replicate so he's going out and he's telling the story about what Jason does for him over and over. He's getting speaking engagements for Jason up in the New England corridor and down into Philadelphia. Jason is now on a speaking tour. That is replicating and it's all being inspired again by Fred.

I really want to underscore something that we've learned John. This is unusual. You don't hear this talked about in business and entrepreneurial world but that interpersonal connectivity. I'm looking for great creativity. Steve Jobs says that creativity and imagination are more important than intellect; so said Einstein so said the President of Harvard. That's very significant. Creativity and imagination is more important than intellect in business going forward. That is what my father-in-law would call a whopper doodle. That's just a big deal and that's a quantifier. How do we foster, how do we forge an environment of creativity? You know what the biggest monster is John? The scourge that is going to stave this off, keep it at bay is busyness. We're busy, we're busy, we're busy.

I'm asking for a behavior interruption here John Bowen where we stop and we pause and once a week we gather our team. I don't care if it's for 15 minutes, but I like it on Friday mornings. I like all the handheld devices turned off. Ideally everybody has just exercised and you've got two, or three, or four high value relationships to whom you want to deliver an authentic wow.

Now one more really important point and I go back to you John. I've got to find that wow czar. Who's that person on your team who is outstanding at this? This just comes naturally to her or him. Now I'm going to get myself in a little bit of trouble here with HR again John, but it's been our experience that women tend to be a little bit better at managing this than men. After all as my daughter pointed out, what is wow spelled upside down? Right? Exactly. Now having said that at Janus Labs in Denver, Colorado I have Jim Todd and Jim is an incredible wow czar.

We help, in our case the financial advisors, come up with great ideas to really hit the mark and make meaning. Make meaning in a commoditized world John Bowen.

**John B:** This is so powerful and I see it over and over again. I've had it in every one of my businesses. I've had that person and I've had both male and female so it's not gender specific.

**John E:** All right we're safe now, we're safe.

**John B:** It is having someone that is really good at it and then creating kind of the how often you're going to do it, what type of client. Who are the VIP's in your friends of the firm; whatever terminology you want to use and establishing a budget and I'll tell you the ability in today's world. We use some concierge groups to help us create those events for our really most important clients. We go ahead and it doesn't have to be big dollar amount but it has to be something that's unique to them. It's amazing and this goes to kind of the fourth step that you talk about is perpetuating; creating a magnetic echo system. It's one thing, sometimes we get caught up and we do this once and wow, it's working well.

**John E:** Exactly.

**John B:** We delivered the wow experience. Where the real big dividends get paid is when it's wow consistently for all our top clients; all those CMOs, those client marketing officers that we're really activating and they're going to bring us in to those right replication opportunities.

**John E:** That's powerful John. What we want to do is again we want to really the aspiration is operationalizing wow, making it systematic. It drives me nuts when I consult with clients and they tell me well I did my first wow and I think well okay great. You get this feeling that it's a fait accompli. It's done. No, no, no, no. The aspiration is ongoing wow. This is the business in a commoditized world; how well we meaningfully connect.

I have the great fortune of working with Betsy Sanders former senior executive for Nordstrom; largely credited for creating that incredible, incredible client experience at Nordstrom that we all have grown to love and appreciate. She would talk about and she's very strong about this, get clear on with whom you want to work. You want to evaluate your book of business and then write out the characteristics, all the possible characteristics you can and then make sure that the wow, the wow is my word here, wow is happening routinely, systematically, over time. That's how we perpetuate this practice.

Again all the while one of the wonderful consequences is an upward spiral of positivity. You're going to see, I mean we think we're doing wow. It's fun for them, the wowwee. The wower we derive tremendous benefit John from habituating or again operationalizing wow.

**John B:** You know it's not only you as kind of the lead entrepreneur if you are but it's your whole team. I mean everybody loves doing this. This is fun and I have found a lot of reciprocity to be universal.

**John E:** Oh boy.

**John B:** The payback on this stuff and you don't go in with the idea that you are; it's kind of a ledger type. It just will happen but you've got to do it. Now one of the best things let me go into the next segment because we're building like this is all great. How do I do it? The next segment is tip of the day. The nice thing is you've been working really hard John putting this book together. Tell our fellow entrepreneurs how they can get your book because it's not yet on Amazon but I know I'm holding it up here and it's a great book and it is an easy read and it is Wow 2.0.

**John E:** Well thanks John. It's been tremendous. The book is three days old and the response has been overwhelming. We've just my partner at Janus Labs Tracy White, she and I authored it. We had some tremendous contributions from professionals like yourself but you also know Shawn Achor who's the bestselling author of "The Happiness Advantage". He wrote the forward which is just dynamite. I mean he's got some tremendous statistics.

**John B:** I was just going to say I want you to bring up the statistics because for our hard charging audience it's all numbers. As a matter of fact I'm going to open it up.

**John E:** For the left brained of our audience.

**John B:** Yeah. Shawn put in and when I was reading it I guess I, you know. By doing what we're talking about, practicing wow, 37% increase in sales across industry, 31% higher levels of productivity, tripling creativity and 19% increase on accuracy with task. I'm going John, okay I've got to read the rest of the book. I mean you've got to not only read it you've got to put it into action.

**John E:** Right. We've got to put it into action; that's exactly right. That's why I want starting today for all your listeners John one more wow per week. One more unique emotionally engaging experience that goes beyond expectations and is readily recounted over the course of the next eight weeks. If nothing happens over eight weeks I will fly to wherever you are and take you out for lunch and apologize; but I have that kind of confidence. After four years in the marketplace it goes right to ebitda. This drives business in no small measure but I need strong leadership. I need somebody from that team to really buy in, in earnest. We've got to appoint that wow czar and we've got to start having these wow audit sessions on a regular basis.

Yeah, the book is available at [janus.com/labs](http://janus.com/labs) and you can pick up a copy of "WOW 2.0: Ignite Your Business and Your Life". It was just working with Shawn Achor was so eye opening because look, happiness matters to the bottom line. This is tough for our left brained audience because curriculum is mostly right brain oriented John, right? This is a curriculum that's inspiring hopefully creativity and creating meaning and emotional connection with important relationships.

If we go over to the left side, we're seeing a lot of data and Shawn Achor points that out. He's as you know a positive psychologist from Harvard and he's worked all around the world showing how important happiness is to an input in driving ebitda.

**John B:** This is, Shawn I had come out to my mastermind group of 200 plus financial advisors from the top in the world and he was a huge hit. This is as you mentioned so many entrepreneurs and financial people certainly are left brain dominant. We're very logical and so on. We want the numbers and Shawn is sharing this kind of soft fuzzy happiness and yeah, I want to be happy but I don't care about the rest of my team. Well he was showing well no, you do care. You do care about your clients and these numbers are really powerful. We're going to have to have Shawn on the podcast as well.

This is very critical and I just want to pull up the website again. We'll have the links where you can request your copy of "WOW 2.0" and all the links if you're listening to this you can go to [aesnation.com](http://aesnation.com). We'll have the transcript, the show notes, anything that John and I talk about.

Let me go to one more on resources and John, Janus is a huge company. It's one of the largest mutual fund companies in really the world. It's one of the biggest players, a high profile one. Are there any other resources for entrepreneurs that we should be pointing out?

**John E:** Yeah, listen John I think the most important resource is information. Now let me expound on that a little bit if you wouldn't mind. If real estate is all about location, location, location this kettle of fish; creating a tremendous not just a good client experience a tremendous client experience is all about information, information, information. I'm going to answer your question by saying that the real resource is the information that is flowing up under your fingertips right now to your entrepreneurs. They are gaining access to the information. How is that information flowing within the team? We need to capture that information and we need an owner. We need that wow czar in charge of delivering these wows. We have to set a vision in place for being earnest about delivering wows. How is that information flowing? That is really the critical asset to the practice.

**John B:** Now it really is. You have in the book, I'm going to encourage everybody to download the, or not download to order the book. Near the end you have kind of how to really ignite this project to create the spark in your practice, and in your company, your team and starting the

fire. What you have to do is you commit. We all know that. We have to go get the tools. We've got the ideas. You've got so much in this book.

Then feed the fire and this is where we're talking about it's so easy to just pick up any book and do it once. This is something that's going to pay such dividends and really live it. You know the spread the fire, live it, let your clients bring that out to and replicate. I mean it takes off like crazy.

Let me go to the last segment here I want to do and it's key takeaways and I want to come back to. This has been, I mean I've got all kinds of notes here and where it comes together for me is a combination of growth by appreciation, by being ... Not differentiate ourselves. We all talk about differentiating ourselves in this commoditized world, but being distinctive. The one thing that could be distinctive is our own relationship with these top clients. People that we care about that we want to be a hero to. We can go ahead and really deliver this wow experience as John is talking about.

They'll help us replicate themselves. I mean this is, think whatever number of clients. Ten that you have that are top clients, a thousand, whatever it is; if they could just replicate that, help you each year. I mean it's amazing what can happen. You can create this whole process and that's what I want to encourage you to do because you know what? Your clients are going to love the wow. They are going to love knowing that you're the right professional, the right entrepreneur to be working with.

Second, they're going to want to share that experience-

**John E:** Yes.

**John B:** -with their friends, their business associates because you are distinctive. You're delivering tremendous value. They're going to want to share you and you know what? Your business is going to take off. You're going to accelerate your entrepreneurial success even more.

John I want to thank you and I want to encourage everyone out there to reach out, get your book and at the same time execute, execute, execute. Your clients, your future clients, all these strategic partners are counting on you. Don't let them down. We wish you the best of success.

**John E:** Thanks John Bowen, keep wow alive.

## 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.

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Best of success,



John Bowen  
Founder and CEO  
Financial Advisor Select