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ACCELERATING ENTREPRENEURIAL SUCCESS PODCAST

EPIISODE
169

Eliot Wagonheim

Show Notes at: <http://www.aesnation.com/169>



John Bowen and Eliot Wagonheim
Episode #169

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Best of success,



John Bowen
Co-founder, AES Nation

John Bowen: As entrepreneurs, we all want to grow our business dramatically. This is a real challenge. We have to understand lessons from our fellow entrepreneurs, be able to bring it into our business, and we want to have them really work with remarkable entrepreneurs. I have one today. What I really love about him is, not only is he a great entrepreneur or great business person, but he's an attorney as well. He understands. This is something that's so important for all of us. We've got to make our commerce, our business decisions. We've got to be able to serve our clients well. We've got to deliver value for them. That's what creates value for ourselves, and our enlightened self-interest. Working with attorneys, a lot of times, they're going to say, "No." Here, you've got a say, too. He's not only going to show you that it's not no, but how to focus, how to make it simple and elegant and really grow your business dramatically. I'm John Bowen. We are at AES Nation, accelerating your entrepreneurial success. Stay tuned.

Eliot, I am so excited to have you here today. It's unusual. Quite honestly, I don't have that many attorneys. We have a mutual friend, Jessica Rhodes, who, and what I do have are more tax and estate planning, not a corporate side. Jessica said, "You've got to have Eliot on. He's phenomenal." As we've gotten to know each other as well as your book, which we're going to talk about a little bit later, I've been blown away with how you mix that entrepreneurship and the legal and really provide some great insights. I want to have you share your insights with our AES Nation community, but before we do that, I'd like to get a little back story, because it's a little. We're all weird. I told you this before we turned on the camera. We're all a little weird, but being an attorney and a successful entrepreneur, not as many out there. That's a small crowd. How'd you get there?

Eliot Wagonheim: I'll tell you, because I was a business person first. I started companies before I ever went to law school. It comes down to this. When I graduated from law school all the way back in 1987, my sister gave me a coffee mug. The coffee mug read, "I'm a corporate attorney. I keep exciting things from happening." I've kept that coffee mug around just to remind me what I'm not supposed to do. For the most part, when you're in business, and your audience knows this. When you're in business, a lot of times, legal is where great ideas go to die. It doesn't have to be that way, especially if your thinking is entrepreneurial first, and then, "Let's inform that with legal training."

John: I did read, Eliot, about your sister giving you that mug. I hope it was a sense of, she was being a little ironic on the whole thing versus telling you what the future should be.

Eliot: Yes.

John: I think one of the best training for all corporate attorneys would be yours. You go ahead, and you go business first. Then you understand the challenges of an entrepreneur and then really coming back and getting that legal background. It's a really strong positioning. I want to

go right to the lessons, because we want everybody here to get tremendous value. You have something that I liked a lot. Rule number one, it's pretty close to my rule number one, is Make it Easy. What are we talking about to our fellow entrepreneurs when you hit the table, rule number one, Make it Easy.

Eliot: Everybody in my office knows what this is. It's rule number one, which is make it easy for people to do what you want them to do. The example I gave you is, if you want to get paid, if you know you want to get paid, but you decided that you were only going to accept certified checks, then you're putting a tremendous burden on your customers. They mean to pay you. They want to pay you on time, but they don't go into a bank. Nobody gets a certified check any more, unless you're buying a house. Your payments are going to be slow. They're going to be skipped. They're going to be put to the bottom of the pile because you didn't follow rule number one.

Real quick, I'll just tell you, I started crafting this because way back, I had this two-door Honda Prelude, and I parked in front of the Circuit Court for Anne Arundel County in Annapolis. I parked too long. I got a ticket. It was \$50. I looked on the ticket, which I meant to pay, and the ticket said, "We don't accept checks, and we don't take credit cards." This was before online payment. They would only accept money orders. I meant to pay it, but I just never went into a bank. Who goes into a bank? A month went by. They sent me another bill, and it was the same \$50, no interest, no cost, no penalties, just \$50. Again, I meant to pay it, and yet I did not. Cut to the chase. This went on for five years. Five years they sent me this same \$50 bill. I had gotten rid of the car. The company that owned the car, which was one of my companies, was out of existence. It no longer existed, and yet for five years, they sent it to me. It was a sterling example of how to violate rule number one.

John: That's a great example. In business, we so often do that. I think of, one of my primary businesses is coaching financial advisors. We charged, the coaching program is \$24,000 per year. Initially, we would only take a couple different payments. Then we started to get a little bit more creative. We pretty much took everything. Then, we wondered, if we made it a little bit easier and just made it monthly payments and more of a subscription model. We found, we did a little test. We never had any collection problem. Business increased by about 25% by doing that. It's just these little things that, we've got to understand our clients, what they want, and make it easy, as you say.

Eliot: Absolutely. You can tweak the business model so that if you know that, for example, I know that I do my best work with a clear and open line of communication. As a lawyer, if I start billing everybody \$20 or \$50 every time they pick up the phone, they're not going to pick up the phone all that often, so I can't keep my finger on the pulse of the business. I've got to tweak my business model to make sure I'm not penalizing people for doing what I want them to do. Another example is that everybody has a different way of consuming content.

My youngest son, very curious about the world, very intelligent. He hates to read, because he told me, once he could articulate this, he can't hear the voices in his head of the characters or whatever when he's reading. What I figured out was, he just voraciously consumes content through audio books, because he likes to hear. If you want to coach people, if you want to teach people, if you want them to consume your content, make it easy for them. Account for the fact that there are different ways of consuming content among your clientele, and make it easy for a whole host of people to embrace what you're teaching.

John: This is great. I want to go to the next, which, your son is a great example of this. So often, we're building businesses, and we're so busy doing it, doing it, doing it, that we never take the time to step back and look through what we're doing through the eyes of our best clients. In working with not only your business, but as you help other fellow entrepreneurs, that's something that's been really important to you.

Eliot: It has been. Early on, I got a piece of advice that I really took to heart. A friend of mine said, "Eliot, your clients aren't you. They don't talk like you. They don't look like you. They don't think about what you think. They don't write like you do. The same things that keep you up at night don't keep them up at night." That's true. We have a tendency of thinking, if I like this, then everybody's going to like this. What you've got to do in your business is to see the world through somebody else's eyes, really get inside the mind of your best clients, the people that you're trying to serve, the community you're trying to reach. See the world through their eyes, because I'll tell you something, John, that I've learned at great cost. The golden rule is wrong. The golden rule is, treat people the way you would want to be treated. That's wrong. You have to treat people the way they want to be treated. Those are two very different things.

John: That's great. I haven't heard it positioned that way before, Eliot. I think that's so true, because we all have, we all come from our own backgrounds, our own biases. We know how we want to be treated, but for so many entrepreneurs, the service we're providing, if we think of ourselves as the client, we're going to do it all wrong. We've got to reach out and get a better understanding, and really look through the eyes. This is where, as we're going over rules that you have, I'm going to call it rule number three is, finding your best client or customer and starting that dialogue. Where are you going with that, Eliot?

Eliot: The easy exercise is to go down your list of clients or your list of customers, and just think to yourself, if you could wave a magic wand, who would you clone? Who would you get five of? Who would you get ten of? The answer may differ, depending upon you, your likes. It might be that your best client pays you the most money or is the most receptive to your new product lines or allows you to do your most satisfying work, whatever that means to you, or maybe allows you to have the greatest impact on your community. Whatever criteria you establish, you figure out who your best client is, and then your laser-focus on appealing to that group. If you just hire somebody in marketing to do SEO or get your social media in shape

and do ads or your website and you haven't actually taken the time and expended the gray matter to figure out who your best clients are, you're wasting your time. It's like being a mile wide and an inch deep. You don't want to do that. Nobody wants to do that.

John: The thing that I like about this, and this is actually something that we teach in our coaching program for financial advisors, because if your best customers, for whatever reason, they feel that you're delivering value. You want to understand that. If you can, the way I think of it is the four most powerful words in the English language. "I need your help." If you go to your clients, and you say, "I need your help. I want to make sure I'm taking great care of you and people like you, but I need to understand." Depending on your product, your service, your solution, having a series of questions drilling down the insights that you get. You can go out. I've run research firms. We would charge you \$50,000 to go out and ask your best clients these questions.

Eliot: Right.

John: There's value in that. We'd write it up really nice, put it in a nice brochure and all that stuff, or you could get a lot more value and actually have that conversation together. They love having it.

Eliot: Yeah, they do. They love giving the advice. You know what? You have to, there are two parts. One is, you have to have the conversation. I don't mean picking up the phone. I mean seeing if you can sit down for coffee and listen. You tell them right up front, "I'm not asking to try and sell you something. I'm not asking you to write a bigger check to me. I want your advice. I need your help." Exactly as you said. The second part of it is, you act on it. For example, I learned early on, I talked to a marketing consultant a long time ago. He said that he was going to go out to talk to my clients. I said, "Okay, but I know what you're going to find. I know that my clients come to me because I have this incredible legal expertise. I'm just a really, really good lawyer." He goes out. Being a really good lawyer wasn't actually in the top five. What they liked was the fact that I returned my phone calls, that I'm accessible, that I speak English, meaning not legalese but real, live regular person English, and I understand business.

They assumed that I knew law. If you take that lesson, that means that in a typical lawyer's website, when they say, "These are the lawsuits I've won. This is where I went to school. These are the legal briefs and cases that I've taken on." Nobody cares. You have to play to the strengths that your best clients perceive in you. You have to have testimonials that say, "You know what? Eliot's pretty darn responsible." Or "I like talking to him, because he understands my business. He's a business person first." That's what people care about. You've not only got to take those conversations and make an effort to reach out to your clients,

but then you've got to do something with it. It's not enough just to nod your head and then move on to the next meeting.

John: I want to give two examples, too, Eliot. I think this is so important. It's easy to miss it. When I was working in sports and entertainment, I was a CEO of the financial side of a pretty large organization. We had 600 ultra-affluent clients. Most people would know maybe two-thirds of the names or more. They're some extremely famous, very successful individuals. Most were either in LA or New York as their home base. We surveyed a good portion of them to see the value. We handled all their personal finance. We built their homes in the sense of managing it, bought their cars, their jets, their planes, everything. Number one thing they loved was, in LA, that when it rained, their house leaked, they loved that we had a contractor on retainer to go out and do it.

Eliot: That's their need. That's right.

John: The second biggest thing was, we paid their bills on time so they didn't get any late charges. Forget all the other glamorous things. This is where it's so easy. You go, we don't know oftentimes what it is we do for our clients. Let me give a second example, because I think this is a good one. It relates to a lot of entrepreneurs. We work with a lot of financial advisors. We also have a matching service, matching successful business owners with the right vetted financial advisor. So many financial advisors, in the US, there's 460,000 financial advisors. They're very investment-centric. As business owners, most of us want to invest a fair amount of capital in our business. We're not quite as big as the rest of the world on that investment side. As smart entrepreneurs, we have to maximize our personal wealth outside, so that gives us a lot of flexibility. The way to do that is oftentimes mitigating taxes and taking care of the heirs and making sure the asset protection stuff is there. Most advisors don't do that.

When we do the research and we survey business owners and share that, the advisors are blown away with that impact. Once they stop talking about investments and helping on the bigger picture of helping these entrepreneurs become seriously wealthy not because they're greedy on the personal wealth side, but so they can take care of the people they love and really the causes they care about, there's a quantum jump in success.

Eliot: There absolutely is. I've been called in by investment banks, even valuation firms before, not just to talk about the legal aspects of what they do, but one called me in just to look over their proposals, because their proposals would have, "Here's our valuation methodology. Here's how we choose this. Here's how we choose that. Here are our biographies, and here are our founders, and here's the letter from the president." You know what they didn't put up? Certainly not front and center, and I don't even think it was in this particular proposal at all, was exactly what you were saying. "Here's how we pay the bills on

time. Here's how we protect your legacy wealth. Here's how you're going to provide for your children and your children's children." Everything else is commentary. I'm going to solve your problem. That's two issues. Number one, I know what your problem is. I understand the problem.

John: Let me stop you just for a second there, because I think, Eliot, that's so fundamentally important. Most people, most entrepreneurs, we're not clear what the problem is that we're solving. If we can let that prospective client or our client know that, that takes care of so much.

Eliot: It does, because you've already broken down that educational barrier of, why do I need you? Tell me why I need you. I'm going to solve your problem. Here's the thing, John. People don't buy drills. They buy holes. If I want to put up cabinets in my garage, so I've got to drill through the concrete, and I've got to go to Home Depot, and I see a whole aisle of drills talking about torque and talking about different models and how long the battery life is, but I'm not buying a drill, John. I'm buying holes. I want the holes in that concrete so that I can put up those cabinets. Too many people, in their proposals, spend all the time in the world talking about the drill.

John: Yeah, and how nice it is, and how good I handle it, and all that.

Eliot: Right.

John: It's really, one of the things, as I just turned 60. I wish I knew what I knew now in my 30s, because I would be a lot less confident. Really, it's very, I was a lot smarter in those days, too, Eliot.

Eliot: You and me both.

John: The key thing that I think that it is, we do all kinds of research in our businesses. I'm surveying tens of thousands of people each year. I used to give all the statistics, and isn't this great? The end of the day is exactly, you talked about the hole. People want the result. That's all they want. Once we know what their concerns are, whatever you're addressing, and you can then articulate how you're going to get the results for them, and it's not about you. It's about them, and the satisfaction they're going to have going forward, you're going to do great.

Let me switch to, number four, having a place for your best customers to go. What is that?

Eliot: It means that once you've identified your best customers and you've talked to them, and you know what their problem is and the solution you're providing, you've got to create a way for them to find it very easily. It doesn't just mean a website, but it means that there's an environment. You take my world. In my world, I represent, I serve as general counsel to small

businesses all over the country. If somebody wants to hire me as general counsel to do a certain number of things, at some point, they're going to have to sit in my conference room or figuratively, like we are, or literally, physically. They're going to have to make a decision to write me a check. Now, meeting me at a networking event or meeting me over coffee and writing a check, there's a big gap between those two things. You've got to create a way to form the relationship.

For example, we have very intermediate steps. Tomorrow night, as a matter of fact, I have a number of events for my law firm. I wanted to combine the substance of a lunch and learn with the informality of a happy hour, so about once a month, I have things called Drink and Thinks. My Drink and Thinks pull in people of influence or people of interest to my best clients, just to hear them. They don't want to hear a lawyer talk all the time, so just to hear them. Next month, for example, we've got somebody coming in on solving business problems with Legos. It's a really cool presentation. I create a way for my best clients, I create an environment where they want to be.

I create a way for them to come in. Nobody's going to see what they can do to put them in a used car today. There's no sales tactic. There's no high pressure, but I create a place for them to start to get to know me, and I create a way for them, little by little, to inch closer into my circle so that we can develop a relationship, which in the fullness of time, may result in an attorney-client relationship. It may not. It's just somebody that's a great person to have in my network. You've got to create a place for those people to go.

John: This is so important, Eliot. What it is, I want to think of it. I think of it as overall marketing. What I mean by, to me, marketing is all about starting a conversation, starting that relationship. The more we can understand our clients, we've talked about really getting clear who our best clients are, having that conversation, and then making this comfortable place for them to come to have these conversations, develop that deeper relationship, not to manipulate them, but to gain a better understanding so that we can serve them and do so much more value. People are running workshops and seminars and all this to sell and pitch and so on. The classic lunch and learn, I do like Drink and Think. I'm going to go to yours before.

Yeah. The part, I wonder, as we're thinking about this, I would challenge every other entrepreneur, whatever business you're in is, how can you make it easy to come together? There's so many different types of events that you can do.

Eliot: Yeah, there are. One of the keys, and I think this is so hard to do, but it's to forget about the first person. Don't do your website that's focused on I and we, but make it a mirror so that your best client can see themselves in it. Don't do your events that are focused on I and me, because, look. I know you work with a lot of financial planners. How many of them will have

these things that say, "If you come to my office, or come to a restaurant, then you can hear me talk about my thoughts about retirement." I get that, but it's still about you. It's still about, I know if I go, I'm going to listen to a sales pitch. Maybe an informative sales pitch, but it's a sales pitch, but if it's about me, if it's not...

For example, if a financial planner says, "Eliot, I know that your son is 17. Your oldest is 17. He's a rising senior. I know you've probably got questions about paying for college. I'm going to bring in an expert in this. You know what? It's not a sales pitch at all. They're not looking to be a client, whatever. They're just going to educate you on different financial aid that may be available or different scholarships that you can apply for and the different steps that you can take." You know what? I'm all ears, even if there is a little bit of a sales pitch. I'm all ears, because they identified a problem that I have. It's not just calling me into their meeting so they can talk about the thing that they want to talk about.

John: That is so much, we're all so busy, to the extent that we can really get exposed to things that cause us concern and potential solutions. There's so much value in, so often, that introduction, Eliot. That just cements the relationship, even if there's no business. That value added that you brought is huge. I'm going to go one last key takeaway, lesson learned that you had. This is one that, I think, is counter-intuitive to a lot of people, is going outside your industry for strategies, tactics, and ideas. I want to be the best attorney or the best financial advisor or best widget maker. I should go to my industry conferences. Why do you tell your entrepreneurial peers this?

Eliot: Recently, I went to an expo. One of the sponsors was a law firm, so naturally, I was drawn to the law firm table. I looked at their brochures. Their brochures were gorgeous, John. I've got to tell you. The paper had a higher thread count than my sheets. The font was perfect. The images were great. It was great. It was terrific, but I knew that if you wiped away that firm's logo and put another firm's logo right in there, it wouldn't make a darn bit of difference. They didn't differentiate themselves. What they tried to do was be the very best law firm brochure they could possibly be. Who cares? If you want to be great at customer service, if you want to micromanage your client experience, go see what the Ritz-Carlton is doing. Go see, if you like an experience that you had, whether it's at the Apple store or whether it's at some craft show, go think about and take apart what they're doing and then do that.

A good way to think about it is also the opposite. Everybody has a series of horror stories. If I said to you, "Can you think of just a horror story in retail? A time when you walked into a store and they just blew it. It was just a bad experience that you had," could be a restaurant. Could be retail. Could be a service business, whatever. If you start unpacking that and write down the details, and just do the opposite of that, you're well ahead of yourself, but don't restrict yourself to your industry. You don't want to be the tallest of the seven dwarfs. You

want to look outside to the strengths in any industry, and see how you can incorporate that into what you're doing. That's how you stand out.

John: This one, I really am a big believer in, Eliot. I spend \$100,000 a year or a little over that being parts of Mastermind groups, CEO groups that are outside of the financial services industry, because there's so many good ideas out there that I would never see if I wasn't in there. Definitely, you can pick up a book. You can go to the Ritz-Carlton. One of the things, observe everything, but also, I'm a big believer in not leaving anything to chance, because hanging out with other fellow entrepreneurs who are going in different directions, but are having success, so many lessons. You know what? I want to go to, one of the best ways of getting knowledge, in my mind, is books. Best deal out there. We have a segment called Book of the Day, Eliot. I'm pulling up on the screen Amazon, your new book. Fire, Aim, Ready. I thought it was Ready, Aim, Fire, but anyways...it's not a typo.

Eliot: No, it's not.

John: Why don't you tell us a little bit about the book and why your fellow entrepreneurs should really be reading this.

Eliot: Fire, Aim, Ready is built on the Stephen Covey approach to start with the end in mind. Where he might talk about bullet points or figure out your end goal, you have to tell the whole story. I'll give you a quick example. If my client calls me and says, "Look, I'm thinking about signing this contract," my first question is going to be, "Let's assume that you do. Explain to me why in six months, you're going to pick up the phone and call me, asking me to help you get the heck out of that contract. What is it that's going to cause you to want to break and run? Let's go through it. Let's tell the story." As we go through all of these things, then I say, "Now we know how to write the termination, how to write the protection clauses, how to write the escape hatches into the contract, because we've told the story of the end."

If you're joining a partnership, you can say, "Here are the two questions. What would make you, in three years, turn to your spouse and say, 'You know what? Joining into a partnership with that guy was the best thing I ever did.'" Let's tell that story. What does that look like? Conversely, how does it look when it ends? What would make you want to get out, want to get him out? How do you see this coming apart? Let's write the script on how that happens. You fire first, meaning that you have to envision the shot first. Then, having envisioned and told the story of the end, then you can aim and get your company ready.

Fire, Aim, Ready Management is the first in a four e-book series that deals with four aspects of business: management, contracts, partnership, and people. Management tells how you to recruit, how to form a company culture, how to stand out, some of the things that we've talked

about here in terms of standing out from your competition, looking through other people's eyes and really forming your company as the best it can possibly be.

John: I love it, and it love the subtitle. I want to just read it, because this Fire, Aim, Ready Management, the Start at the End Approach to Crushing Competition. It is so powerful when you understand that, crafting the culture and cementing the relationships. Encourage everybody to reach out. Again, we'll have the links. If you're driving, don't try to write this stuff down.

Go to AESNation.com. We'll have the show notes, the links for everything we're talking about. Let me go to the next section, which is resources, Eliot. Let me pull up your website. Tell us a little bit about this, what you have at the FARsighted business website.

Eliot: FARsighted Business is the platform that reaches out beyond Maryland, so it talks about my speaking. I speak internally to companies and also, of course, to conferences and things regionally and nationally. I do consulting work. I have a blog that's now on Huffington Post, and then books, of course. Through FARsighted Business, it allows me to expand my platform. My law firm is Wagonheim Law at Wagonheim.com. That really tells more of a story of individual work with clients as an attorney.

John: This is great, and this has been so useful. Let me go to the last segment. I want to pull together what I always think of the key takeaways, and what I'm going to do with the lessons that Eliot is sharing with us, because these are so important. It's all about accelerating our entrepreneurial success. This is a big deal. Rule number one, he shared, Make it Easy. This is, I have three words that we're running for our business. It's Focus, Simple, and Elegant. An easier way to say it is easy. You just make it easier for clients. That keeps you focused. Make it simple and elegant. So often, as entrepreneurs, we can make things complicated. Look through the eyes of your best clients. These are so powerful. They're simple concepts, but I'll tell you, in the heat of being a business owner, an entrepreneur, we forget those.

What is your best client? What are they seeing? What do you see when you look out? Find those best customers and talk with them. Interview them. Pretend like you're a market research person. Use that, four most powerful words in the English language is "I need your help." If they're a good client already, customer, they're going to be more than happy to share. They're going to often times point you in a different direction. Create a venue, a place for your customers to go to hang out with you. One of my good business friends, he was just starting to have success, and he put an event together for his top clients and spend \$500,000 to do this in London. He invited me. I'm going, "David, I think you're crazy. This is just unbelievable." David goes, "John, the amount of revenue that will come out of this by hanging out with my top clients, this will be so worth it." David went on to be a multi-billionaire, so hold those events. David would probably say that's one of the key reasons.

The last rule, Eliot, that you shared is looking outside the industry. Yeah, don't try to be the best of whatever you're doing. Go outside. We need to each make ourselves distinctive. One of the best ways is bringing something from outside the industry. Eliot, I want to thank you. This has been invaluable. I want to encourage everybody to go, point to our website, AESNation.com, to take these lessons. Download the transcript. Highlight these rules. Make sure you're putting them into action. Your current clients and all those future clients, they're counting on you. Don't let them down. 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

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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.

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Best of success,



John Bowen
Founder and CEO
Financial Advisor Select