

# The Poterack Process

## AGENDA

February 20<sup>TH</sup> - February 21<sup>ST</sup>, 2019

### WEDNESDAY, FEBRUARY 20<sup>TH</sup>

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- Noon - 1:00 PM**      **Welcome Lunch**  
Location: Hampton Inn & Suites Charlotte/Southpark at Phillips Place  
Cooper Room  
6700 Phillips Place Court  
Charlotte, NC 28210
- 1:00 PM - 2:00 PM**      **Revamp your New Client Acquisition Process**
  - Improve your Question game and the Answers will be easy!
  - Are you selling YOU or are you selling products?
  - You're like everyone else, until you're not. Courage to be different pays off!
- 2:00 - 3:00 PM**      **Train your future clients to respect your time; The Poterack Process can be yours!**
  - Discipline and professional protocols.
  - The importance of a consistent process; Sell the Value of YOU!
  - Learn how our "Initial Case Analysis" & "Project Fee" exploded results!
- 3:00 PM - 4:00 PM**      **Be different in how you communicate with prospects and clients. Outcomes > Products**
  - IRA Exit Strategy & Tax-efficient Allocation with 3 Types of Money (in IRS code).
  - Prospective Client Bias Exercise will eliminate "I want to think about it".
  - Use technology to tell your story. We'll share how we use planning tools.
- 4:00 PM - 5:00 PM**      **Bottom Line vs. Top Line**
  - FMOs, BDs, and Marketing firms push top line; You spend bottom line!
- 5:30 PM**      **Cocktails with Dinner Provided**

### THURSDAY, FEBRUARY 21<sup>ST</sup>

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- 7:30 AM - 8:30 AM**      **Breakfast Provided**  
Location: Hampton Inn & Suites Charlotte/Southpark at Phillips Place  
Cooper Room  
6700 Phillips Place Court  
Charlotte, NC 28210
- 8:30 AM - 10:00 AM**      **Revenue Generation: We Share our Lead Funnels with you!**
  - Proven events, profitable strategies, and marketing you can use.
  - Monetize your support staff so you're viewed as an investment not an expense.
  - How you can build a business people want to buy! (Not a list of customers)
- 10:00 AM - 11:00 AM**      **Questions and Review**  
**Optional Live events you may attend (populated with zero mailing costs!)**
- Noon - 1:00 PM      • Ladies Luncheon (lunch provided)
- 6:00 PM - 7:00 PM      • Nibbles & Knowledge (dinner provided)

This workshop is designed to provide general information on the subjects covered. It is not, however, intended to provide specific tax advice. Encourage your clients to consult their tax advisor for professional guidance.

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This example is shown for illustrative purposes only and is not guaranteed. Your actual experience will vary.

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