



The Connected Advisor

Maureen Wilke

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***The CONNECTED Advisor: Eight Months to Building an Extraordinary Practice* provides the strategy, templates and scripts to brand a practice, deepen relationships, automate referrals and retain top clients.**

Maureen Wilke has worked with Fortune 500 financial services and insurance firms, including Morningstar, AXA, LPL, Guardian Life Insurance, RS Funds, banks, credit unions and the Money Management Institute, to help advisors and professionals build successful practices. Maureen Wilke's workshops, presentations, webcasts, videos and book are known for providing the "how to do it" using a proprietary system with proven strategies, templates, and tools.

The CONNECTED Advisor includes:

- an assessment tool to track and measure results
- the 80/20 client segmentation with tracking chart
- templates for creating your unique brand and service levels – Why You?
- social media strategies
- automating a 36-touch point client communications calendar
- client and prospecting events that win new business and referrals
- client reviews with scheduling techniques
- strategic partner and client advisory boards
- a special bonus chapter features how to "Capture the \$2 Trillion Retirement Rollover Market."

Endorsements for *The CONNECTED Advisor*

"I've known and worked with Maureen Wilke for many years. I personally have found real benefits in her program. Whether you're an advisor who is just starting out and needs a grounding in the basics, or an advisor who has hit a plateau and wants to break through to the next level, I believe Maureen's plan for building and growing your practice is a great resource." — Christine Nigro, President, AXA Advisors

"I've known Maureen Wilke for years. She's helped countless advisors become more efficient and grow, so if a bigger, more successful business is what you want, there's no better resource than *The Connected Advisor*." —Evan Cooper, Deputy Editor, Investment News

"The Connected Advisor program is a great nuts and bolts system for building a successful financial advisory practice. Every advisor, whether just beginning in the business or a seasoned pro, will glean important information from this book." — Leslie Banks, Senior Product Manager, Morningstar

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Arthur West:

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Carole Garner:

Reading can called imagination hangout, why? Because while you are reading a book particularly book entitled The Connected Advisor your brain will drift away trough every dimension, wandering in each and every aspect that maybe unfamiliar for but surely will end up your mind friends. Imaging just about every word written in a publication then become one type conclusion and explanation which maybe you never get previous to. The The Connected Advisor giving you an additional experience more than blown away your brain but also giving you useful info for your better life within this era. So now let us show you the relaxing pattern here is your body and mind are going to be pleased when you are finished looking at it, like winning an activity. Do you want to try this extraordinary shelling out spare time activity?

Jennifer Newhouse:

In this period of time globalization it is important to someone to find information. The information will make professionals understand the condition of the world. The healthiness of the world makes the information better to share. You can find a lot of referrals to get information example: internet, paper, book, and soon. You will observe that now, a lot of publisher that print many kinds of book. Typically the book that recommended to your account is The Connected Advisor this guide consist a lot of the information of the condition of this world now. This kind of book was represented so why is the world has grown up. The dialect styles that writer use for explain it is easy to understand. The particular writer made some analysis when he makes this book. Honestly, that is why this book acceptable all of you.

Joseph Felder:

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