

### **Example UVP for Business Owners**

And again, you can use these, bend them, borrow little pieces of them here and there. This particular one is for business owners. And the advisor's audio tag line says I create investment GPS systems for highly compensated business owners so that they never feel lost financially.

And then following basically the same format. I don't know if you're like a lot of my clients that have most of their net worth tied up in stocks, options, 401K's or just in their business and they want to create a plan for their personal assets that compliments not conflicts with the assets that they have in business.

In fact, many of my clients tell me that integrating these two sources of money and making sure that they're working together is probably the biggest challenge that they face. Problem of course is most investment sales people don't have the time, the systems or the expertise to design and implement a detailed, predictable process that can show you not only where you are but the exact path to get you to where you want to go.

And also help you offload large parts of the implementation and execution so the plan actually gets done. Well what I do is take you through a comprehensive nine-step process that fully integrates your work related, business related assets and your personal assets and creates a cohesive, integrated financial plan.

The benefit to you is regardless of market performance we can always see exactly where you stand and know exactly what if any actions we need to take to get your ship right back on the right course.

And then they would insert the appropriate call to action. If it was the advisor saying that, they would suggest that he get together for a cup of coffee or a meeting or lunch or an appointment in the office. If it was the banker that was using this UVP, then they would suggest like they did with Hardy, call over to see if there's any appointment times that are available. So there's for a business man.