

JULY 2019

FREE

INTRODUCING

THE MILLION DOLLAR ADVISOR SYSTEM!





LOTTIE'S STORY

By: Don Quante | Founder, MDA System | MDRT Member

I was totally unprepared for what my family was about to go through.

My grandma Lottie worked her entire life in a shoe factory. She saved over \$120,000 for retirement. Seven years after she retired her money was gone; all spent on eldercare.

Let's rewind a little bit. The year was 1983 and I was still a little wet behind the ears in my new career as a financial advisor. That was the year when my grandma Lottie was diagnosed with Alzheimer's and ultimately forced into retirement. At the time, she was still in the early stages of the disease. The doctor told us there was no way to gauge how long she'd be safe at home.

There were decisions to make and almost no time to make them.

Deciding what my grandma's care would be was no small task. We had to figure out what kind of attention she needed, how we'd pay for it and whether we had the legal authority to act on her behalf.

People are often totally unprepared to answer these questions. Questions like, "How much money do mom and dad have?" And, "What is the best way to pay for this?"

In our case, we phoned two or three attorneys. They all said the same thing: there's not much you can do except spend the money down to the threshold allowed by federal law. So, as a family, we decided that my grandma would live with my parents until her Alzheimer's became too much to handle.

But my grandma had to move out almost as fast as she moved in. Over the next three years, we struggled to find the right nursing home for her. During that time, half of her retirement money was spent on care. And almost eight years after her forced retirement, all of her money was gone.

After my grandma had passed, I found out there were financial strategies we could've used to make her money last twice as long.

I was devastated. My lack of knowledge about eldercare planning cost the family a lot of pain and hardship (over one million dollars worth).

As my grandma's financial planner, I should've known better. If I'd known how to legally protect her money she would have received the same level of care, only her assets would have remained intact and she would have been able to pass it on to the next generation.

I vowed never to let this happen again; to my family or any other family who came through my door. So instead of being all things to all people, I decided right then and there my mission would be to help protect families using the same financial strategies I discovered after my grandma has passed away. I would work exclusively with baby-boomers, helping them not go broke when trying to secure quality, long-term care for their parents or loved ones. It's funny how things work out.

As soon as I decided to specialize, my firm began to grow. Fast. Based on word of mouth alone, a lot of folks reached out to me, many of whom had existing financial advisors.

They all had the same concerns:

Who will take care of us if/when we can't take care of ourselves? And more importantly, how will we pay for it?

The need for long-term care can cause tremendous devastation, personally and financially (I have seen it firsthand). It's the number one reason people outlive their money.

The lack of good, quality financial advice on the topic of long-term care planning is what led me down this path.

Over the last twenty-five years, my firm has helped over 10,000 families. I've hosted workshops and radio shows across the United States. I even wrote a book to serve as a guide for people who might be in the same situation my family was.

And for the last 15 years in a row, I've had the honor of being a member of the Million Dollar Round Table. Something I know other advisors would like to achieve. So I began to train others on the financial strategies, laws, and marketing insights I gained over the years.

After seeing its success with the first advisors I had trained, I soon built a system that positioned other advisors as specialists in long-term care planning. That system is called the Million Dollar Advisor. And since its inception, I've trained over 5,000 advisors and counting.

I say all this not to brag, but to explain the power this solution has to the millions of Americans facing the uncertainty retirement carries.

My goal now has become to share this system with as many passionate financial advisors as I can find.

Because in the end, it's not about what this can do for you. It's about what it can do for your clients and the generations that follow.

1 WHO WILL TAKE CARE OF US IF/WHEN WE CAN'T TAKE CARE OF OURSELVES?

2 HOW WILL WE PAY FOR IT?

WHAT'S INSIDE?

ONE | GRANDMA LOTTIE'S STORY

As a young financial advisor Don's grandma (his first client) was diagnosed with Alzheimer's and ultimately forced into retirement. Unfortunately, Don learned how to properly advise clients in this situation the hard way. **p. 1 - 2**

TWO | WHAT EXACTLY IS THIS THING I'M READING?

Our system works by identifying a segment of the market and making it the advisor's sole mission to solve Baby-Boomer's #1 concern, the rising cost of Eldercare. **p. 5 - 6**

THREE | THE 5 PHASES OF OUR SYSTEM

We provide a quick overview of how our members utilize all phases of the Million Dollar Advisor System®. **p. 5 - 9**

FOUR | WHAT IS THE ELDER-CARE RADIO NETWORK?

It sounds cool, right? Well it is. Ever wanted to host your own radio show? Well now you can thanks to our new professional broadcast studio. **p. 8**

FIVE | WHAT'S THE FOUNDATION PROGRAM?

It's purpose is to build advisors intelligent brands that provide intelligent people a service they actually need. If that sentence rings true to you then check out page 9. **p. 9**

SIX | HOW OUR SYSTEM CAN WORK FOR YOU

If all of this stuff makes sense to you (we sure hope it does), give us a call at 1-800-800-6004. We'd love to learn more about your business to see if we both can help some people and make a little money too. **p. 10**



WELCOME TO THE MILLION DOLLAR ADVISOR SYSTEM!



**LEARN TO EARN \$1,000,000
PER YEAR, EVERY YEAR!**

Great leads await the Million Dollar Advisor. Are you ready for yours?

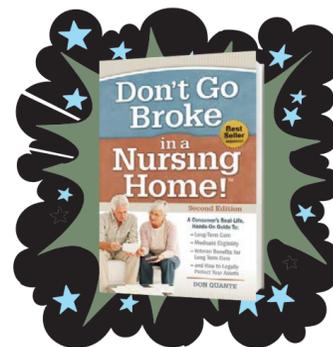


BOOMERS HAVE QUESTIONS, THIS SYSTEM GIVES YOU THE ANSWERS!



This is a full-fledged **CLIENT ACQUISITION SYSTEM** that helps position members as the go-to long-term care planning **EXPERT IN THEIR AREA.** More importantly, it helps people all over the world not go broke in nursing homes.

It works by identifying a segment of the market and making it member's sole mission to solve Baby-Boomer's #1 concern, the rising cost of Eldercare.



PHASE 1

MARKETING TO CURRENT CLIENTS

When starting a new concept or strategy, especially in this business, it helps to have a lot of practice. What's even better is having the opportunity to be paid for practicing. That is why we have every member start marketing to their current clients.

1 ATTEND OUR BOOTCAMP

This is where you'll be able to get the knowledge directly from the source. The creator of this system, Don Quante, leads the training in this fast-paced, round table learning environment. Members are able to discuss any questions in person and get direct feedback. The training goes one full day. We ask members to arrive the night before. We provide the food and the transportation (from the hotel to our offices and back). There is a small fee to attend. Airfare is not provided.

2 WATCH THE VIDEOS

Membership includes access to a library of 40+ training videos that cover topics from product information to marketing best practices.

3 ORDER YOUR BOOKS

Over the years, Don found that people throw away business cards, flyers, and brochures, BUT they keep books. People share books. And, because your information will be on the back, they'll call you when they have questions or want to act on any of the strategies outlined in the book. This book explains Don's story, pin-points the problem, and provides hard facts that support the claim. It also offers multiple strategies for any and all situations clients could encounter when facing their later years. ■



PHASE 2

HOSTING CLIENT WORKSHOPS



We all know that when you make money, we make money. More importantly, if you don't make money, we don't. We believe there is no point in having you fork out a rather large investment to go after new clients right away. (The coach has just given you the new playbook.)

1 PICK LOCATION AND DATES

One of our staff members will help you every step of the way. We like to start planning six weeks out. We provide members with a custom leave behind for the following places:

- Retirement Community
- Restaurant
- Church
- Hotel (conference/meeting room)

2 MAKE A GUESTLIST

You have the option to choose how and who you would like to invite. We have marketing pieces that members utilize for every option. You can give them a free copy of the book. We have a number of pieces that allow you to do so, but we always recommend a personal phone call accompanied by an email follow up with relevant PDFs regarding the topic.

3 MARKETING MATERIALS

Our marketing managers help determine what marketing pieces are best for each member. They'll contact the branding team to get those materials to you. Here is a list of common marketing pieces used for hosting client workshops:

- Times Teaches PDF
- Direct mail letter with free book offer
- Appt. Reminder Cards
- Opening and Closing sales scripts
- The Crystal Ball sales tool (PDF)
- The Presentation (Powerpoint)
- Sample Case Studies (PDF)

DIRECT MAIL LETTER - FREE BOOK OFFER



DIRECT MAIL LETTER - TIME TEACHES



PRESENTATION - CRYSTAL BALL SALES TOOL



PHASE 3

HOSTING NEW CLIENT WORKSHOPS

Now the fun part begins: attracting new clients. These strategies have proven to yield the best results for our members. Participating in the Foundation Program and the Eldercare Radio Network when marketing to new clients drastically increases members' results.



1 PICK LOCATION AND DATES

Each member get assigned a main point of contact to help them prepare. We like to start planning six weeks out. To help our members, we made a direct mail and workshop planning checklist. It has everything they need to prepare for the new client workshop.

We provide members with a custom leave behind for the following places:

- Retirement Community
- Restaurant
- Church
- Hotel (conference room)

2 PICK A CAMPAIGN

After a quick phone call consultation, we help determine what mediums are best for our members' specific situations. Taking into account their marketing budget.

Examples include:

- Direct Mail Marketing
- Social Media Marketing (coming soon!)
- Radio Ads
- Daytime Commercials
- Newspaper Ads
- Local Publication

3 FREE BOOK OFFER

People share books. Over the years, Don found that people throw away business cards, flyers, and brochures, BUT they keep books. And, because our members' co-brand the back of the book, people call them when they have questions or want to act on any of the strategies in the book. This book explains Don's story, pin-points the problem, and provides hard facts that support the claim. It also offers multiple strategies for any and all situations people could encounter during retirement and how to ensure their money lives longer than they do. ■

CATCH LEADS BIG ENOUGH TO KEEP.

With tools to make every part of your process more efficient and a support team excited to help you, attracting high quality leads has never been easier.



PHASE 4 - OPTIONAL



All radio shows are recorded in our St. Louis Recording Studio. The Eldercare Radio Network Subscription* includes:

- A 30-minute Eldercare Financial or Elderlaw radio show with members as the HOST (MARKET EXCLUSIVE!)
- A :15 radio promo for member's shows
- A :60 Eldercare Radio commercial
- Professional photos of members "ON THE AIR" in the studio recording their show to use on their website & for marketing
- A video clip of members "ON THE AIR" in the ERN Studio to use on social media, website, and any other marketing materials.
- Access to our media expert to schedule radio time in member's market at our special group rates.
- Access to purchase exclusive ERN media at a 20% DISCOUNT like: Special supplemental radio shows including one with Don Quante, Best-Selling Author of "Don't Go Broke in a Nursing Home" or an interview-style radio show with members as the guest Eldercare EXPERT. ■

The **ELDERCARE RADIO NETWORK** helps position members as the **GO-TO ELDERCARE EXPERTS** with our pre-scripted radio shows. This optional program adds **MAJOR CREDIBILITY** for our members.



PHASE 5 - OPTIONAL

FOUNDATION
YOUR BRAND STARTS HERE

The Foundation Program is an optional branding program that ensures members are looking their best on all relevant mediums by offering two branding options:



1 BASIC BRANDING

Uses member's current branding in the templated package.

- Web Design & Management
- Brand Messaging
- Brand Approved Headlines
- Brand Fonts

2 PROFESSIONAL BRANDING

The branding team creates a completely custom look and feel (logo, headlines, web design, etc.)

- Web Design & Management
- Logo Design
- Brand Messaging
- Brand Approved Headlines
- Brand Fonts

AT YOUR SERVICE

INTERESTED? GIVE US A CALL! 1-800-800-6004

THE MILLION DOLLAR ADVISOR SYSTEM

GREAT LEADS AWAIT THE MILLION DOLLAR ADVISOR!

Founder and Creator, Don Quante, has spent the last 30 plus years exploring the route to the top of the financial advising elite. And after those decades spent in trial and error, he's carefully crafted a time-tested process that he is now sharing with like-minded producers.



As a member of the Million Dollar Roundtable® for the past 17 years, Don has been traveling around the United States, training financial advisors on how to reach \$1,000,000+ of revenue every year. He's been helping advisors get word of mouth leads consistently and find new, qualified leads through their existing book of business.

The Million Dollar Advisor System® is an online course and community that teaches you (in a few weeks) what it has taken Don decades to learn. Hundreds have already joined our system and thousands have tuned in to watch his one hour webinar and 2 day bootcamp where he reveals the secrets to generating a million dollars in revenue every year.

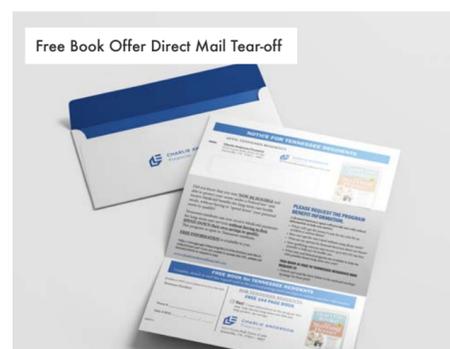
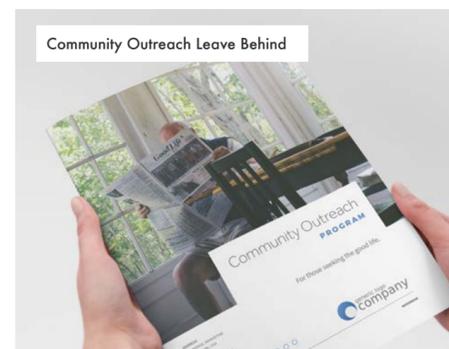
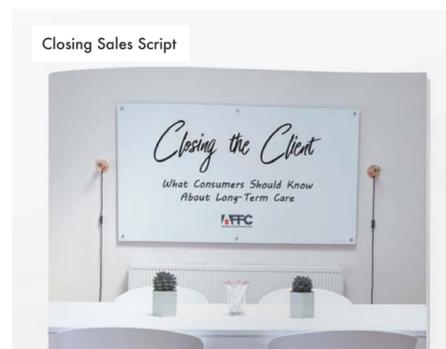
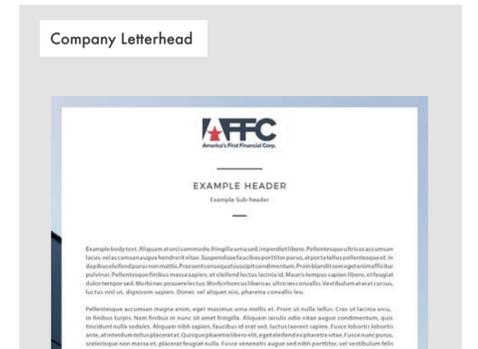
So whether you are new to the business, a seasoned advisor looking to increase your bottom line, or an IMO looking to increase your AUM, this program has huge benefits for all. ■

WE AIM TO PLEASE

INTERESTED? GIVE US A CALL TODAY! 1-800-800-6004

OUR CUSTOMIZABLE MARKETING MATERIALS

Made available to all members of the Million Dollar Advisor System®



AND MUCH MORE!



*Only available to members enrolled in the Foundation Program

IF YOU WANT THE NEEDLE, BURN THE HAYSTACK.

CALL US TODAY!
1-800-800-6004



Join an exclusive group of financial advisors adopting the Million Dollar Advisor System as their own. This time tested niche marketing system was created to help our members attract and retain high net worth clients. It allows them to carve out a healthy chunk of their local market by being sought after for their focus and expertise.

By focusing on Boomer's two core problems our advisors typically provide asset-based solutions and see significant opportunities for other insurance products.

\$397
+ MARKETING BUDGET



Become an Eldercare EXPERT with pre-scripted or Q&A radio shows hosted by you in your local market! We put our members "ON THE AIR" as they host their own radio show & radio commercials in their local area. This helps position members to become sought after for their focus and expertise on the two most important topics on clients' minds: What happens if we have to pay for eldercare? What if I didn't save enough for retirement?

\$3,997
1 HR 30 MINUTE SHOW

\$1,997
LTC MINUTE COMMERCIAL



Your brand is more than just a logo and a website. It is everything you do as a business. It starts with a feeling, that feeling is the feeling you want to provide your customers at every touchpoint. And every touch point needs to be consistent: your logo, brand colors, communication, your aesthetic, your fonts, business cards, flyers, presentations, folders, leave behinds, and the list goes on. So do yourself a favor and call our branding experts today.

\$1,968
BASIC BRANDING

\$2,468
PROFESSIONAL BRANDING