



Got Skill?

The past two newsletters have focused on the **Education** and **Activity** components of **The EASE™ Formula for Success**. This month our focus is Skill.

In your business you get paid to bring value to your clients. Your goal is to solve financial problems. If your clients feel that you have solved their financial problems they will see value and be moved to action.

"If you don't have the skill to move your clients to action, you will not be successful." Michael Morrow

The questions then become: How do you improve your skill of moving people to action? How do you get your clients to look ahead?

Get your client's attention and compel them to be moved to action by breaking down your 4 page complicated fact find into it's 6 critical components. This is an amazing idea, that is easy to do, but also easy not to do. Which will you choose?



Michael Morrow, CFP.

6 Quick Questions to Ask Your Clients

- | | |
|-------------------------------------|--------------------------------------------|
| 1 I am ___ years old. | 4 My net worth is _____. |
| 2 I have worked for ___ yrs. | 5 Value of my estate is _____. |
| 3 I have saved ___ dollars. | 6 Are you happy with these answers? |

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Most of your clients can't answer these questions but they will say, **"I need to take charge of my financial future."**

Transform Knowing into Doing™ by giving this to your clients.

The EASE™ Formula for Success includes tools that you can use in client meetings to communicate financial messages and concepts in plain language. Like 6 Quick Questions, our **Concept Tool's** messages are clear and compelling - the impact is huge. These **Tools** can be used in client meeting to get clients to think ahead about their financial future and be effortlessly moved to action.

"There are all kinds of skills, but the skill to look ahead is something very few people have." Michael Morrow

If you are like me, you likely have boxes and boxes of really good ideas that you have never used. Magazine cut-outs, conference hand-outs, workshop notes; burning ideas at the time, that somehow ended up in 'that box'.



[Catch a sneak peak of Michael's presentation](#)

Action Thought

Action Thought

Turn the mirror and ask yourself these 6 Quick Questions:

- | | |
|--------------------------|-------------------------------------|
| 1 I am ___ years old. | 4 I have worked for _____ years. |
| 2 I have ___ clients. | 5 My annual income is _____. |
| 3 I work ___ hours/week. | 6 Are you happy with these answers? |

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How do you see these numbers change in 10 years? Increased hourly rate, smaller client base, reduced hours? This tool will help you look to the future with a true understanding of what you want your business to look like.

"You can change your retirement right now by changing the forecast of your business." Michael Morrow

As a Financial Advisor for over 23 years, Michael Morrow CFP, knows what it takes to build a successful, referral-based business from the ground up. Michael has developed *Innovative Ideas to Grow Your Business Now!* As an international speaker, his marketing system and financial concepts have helped professionals all over the world grow their business and increase their client retention.



Find out why Michael Morrow CFP, is known as:

The Leader in Marketing Strategies with EASE™

Invite Mike to share strategies at your next event!
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Discover Success Strategies: www.ideasforadvisors.com

All of Michael's presentations qualify for CE credits

If we have impressed you with these ideas, please forward our newsletter to your business associates so they too can use these
Innovative Ideas to Grow Their Business Now!

Wellness for The Financial Advisor

"Things that are easy to do are easy not to do."

Mike Morrow

1. Everything Counts! Calories, votes, and all aspects of your business! Your approach, your image, your brand - don't let anything slide.

2. Keep it Simple! Complete a financial plan or risk questionnaire on your spouse or teenage child. This will help to identify where you need to simplify your language.

3. Stuck in Traffic! The average person spends 32 business days/year in traffic. Audio books are both an efficient and effective use of your travel time.

[For book suggestions visit www.ideasforadvisors.com](http://www.ideasforadvisors.com)



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