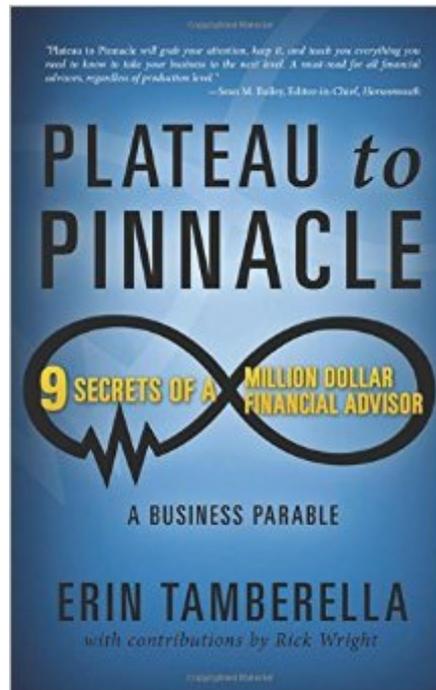


The book was found

Plateau To Pinnacle: 9 Secrets Of A Million Dollar Financial Advisor



Synopsis

Plateau to Pinnacle is the story of Luke, a veteran financial advisor who's been in the business for 10 years. Luke always assumed he'd be a million-dollar producer but hits a plateau that ends up lasting for years. He's grown complacent and comfortable until a devastating event shatters his entire world. Feeling lost and wondering how he'll ever recover, he meets a powerful yet mysterious mentor, Victor Guise. Victor teaches Luke how to systematize his business, and together they lay the foundation he needs to reach the goal he'd all but abandoned. Luke learns much more than just business from his enigmatic mentor. As Victor helps Luke recognize and believe in his own potential again, his business changes and in the process, so does he. The book is content-rich and advisor-friendly. It pulls the content from each chapter into an easy-to-follow, step-by-step checklist for systematizing the advisor's practice.

Book Information

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Customer Reviews

This book is for the advisor just starting out or the seasoned Financial Advisor looking to reenergize and reengage their business. Told in a unique story form, Plateau to Pinnacle engages the reader and offers tips, strategies and plans at every turn of the page. Excellent ideas and very motivating. Do yourself and your clients a favor and read this ONE!

Michelle Arpin Begina, CFP, CIMA, RICP

I thoroughly enjoyed this book! The author was able to strike the perfect balance between practical changes I could make immediately and keeping me captivated by the story. I could not put the book down. The worksheets in the back of each chapter and at the end of the books are the best!

Since I often spend so much time reading financial news updates and investment research, I rarely afford myself the time to read for pleasure. Fortunately, I took just a couple of minutes to read the first few pages of Plateau to Pinnacle, because it hooked me right away. I've enjoyed every second of reading this book. I found it entertaining and easy to read, but more importantly, it's helping me relearn the business in a way I can actually remember and implement. I like the way the end of each chapter is set up, because I plan to refer back to the book on a regular basis. •

Best written book I've read in a while. Great story!

Most fun I've had reading a business book ever! Author has a great story to make her points and share her wisdom. Surprisingly good ideas for advisors. I recommend a sequel. I want to hear more from the mysterious Victor!

An entertaining read from start to finish. This is a fantastic book for any financial advisor to read regardless of production level. I have purchased several copies to hand out to the advisors in the office. The book provides valuable insight as to what steps are necessary to produce a consistent, repeatable processes in marketing, client-acquisition, investment policy and service related issues. Do yourself and your clients a favor and read this book. You won't be disappointed.

Thought provoking business parable written like a novel that entertains as well as challenges advisors to put the advice and strategies outlined to work immediately. Proactive steps to move forward in the business. Ready to read the next book!

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