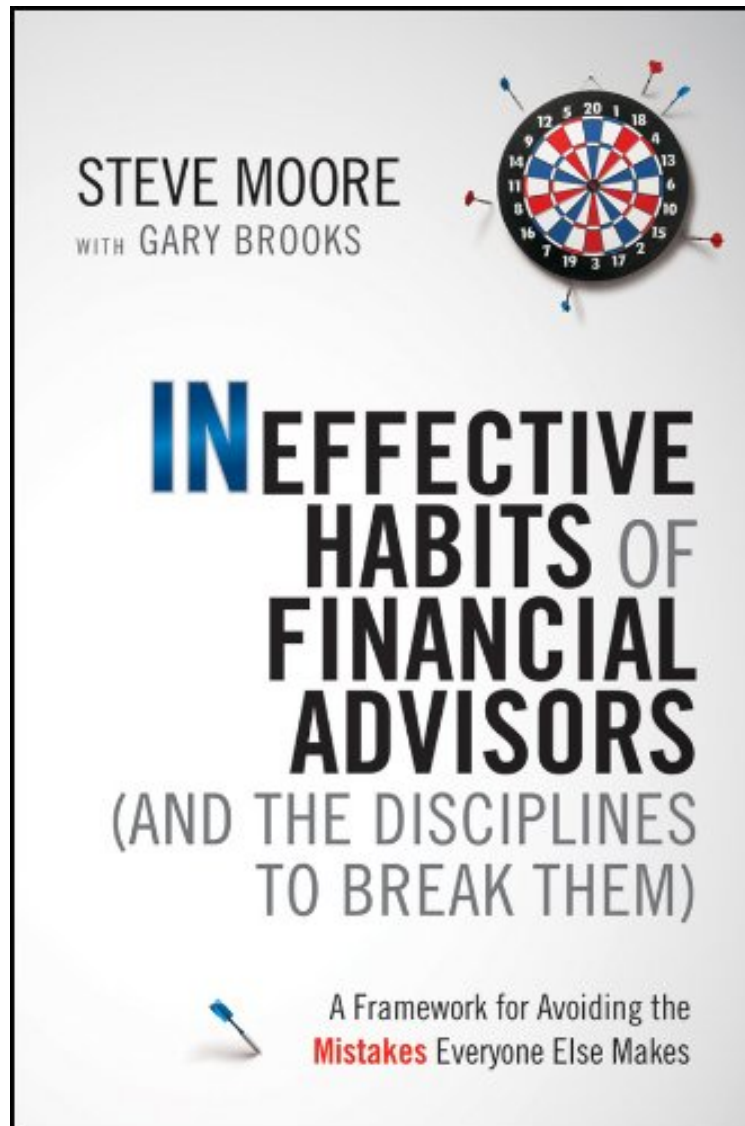


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Ineffective Habits of Financial Advisors (and the Disciplines to Break Them): A Framework for Avoiding the Mistakes Everyone Else Makes

Steve Moore

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15 of 15 people found the following review helpful. Getting to SuccessBy PJ RekstadIn 2001, my six year old practice was humming along. I thought I was near breaking through to a better time when I would be a step ahead instead of three steps behind every day. I thought I just needed to pack a few more clients into the practice, and work a little harder, while the market climbed another thousand points. Then I would be living the dream. At this point, I sat for 90 minutes in a conference session where Steve Moore unpacked the Ineffective Habits of Financial Advisors. He held up a mirror where I saw myself. I suddenly understood why another year of the same was not going to bring the practice under control. He showed me how my Ineffective Habits would yield Ineffective results with a practice that would never find equilibrium. Under Steve Moore's teaching, I have moved the practice focus from Quantity of Clients (nearly 400) to Quality of Relationships (roughly 100). We have improved our Wealth Management Services to clients while improving business fundamentals such as revenue and profitability per client. If you are currently wrestling with a practice that, from the outside, looks successful ("the company's dream"), but from the inside seems too chaotic, you must read this book. The welfare of your clients, your team, and yourself will best be served by looking in the mirror and changing the Ineffective Habits that all too common in investment advice practices. As a former NFL Coach, Steve will coach you through the drills that yield the results you want for the rest of your career.

3 of 3 people found the following review helpful. Useful Overview of Habits to Make (and Break).By Edward J. BartonSteve Moore discusses the importance of focus and direction in your financial advisory practice in this book written for advisors. The ineffective habits discussed by Moore are fundamental for any professional services practice - * Focus on quantity instead of quality of clients* Not focusing on team service - making it all about "me"* Not disengaging problem or unprofitable clients* Focusing on prospecting rather than referral based business* Working for the "firm" and not following your needs and desires Moore then provides a series of approaches, habits and checklists to help transform or break these bad habits and develop winning ones. The book is easy to read, and full of stories and anecdotes that bring home the author's points effectively. There are other books out there on the subject, and some are a bit better in my opinion, such as the "Million Dollar" series. However, you will not go wrong by buying and reading this book. There is a lot to glean here - including techniques that apply to all professional services, not just wealth advising.

2 of 2 people found the following review helpful. Do Yourself a Favor Buy the bookBy Peter MI have never had the pleasure of attending a seminar by the authors nor have I met them. I am a 20 year veteran of the industry with a production level well north \$1mm and I think this book is fantastic. My staff and I are in the process of revamping several of our systems based on this incredible book. Well thought out, presented in great detail and full of powerful ideas and techniques. I read every book I can on the financial services industry and this is the best for a veteran advisor. Tested in the Trenches is also an outstanding read, but this book tops them all. Do yourself a favor and read this book and have your entire staff read it with you.

A how to guide to avoiding the mistakes ineffective financial advisors most often make Based on a 15-year consulting program that author Steve Moore has led for financial advisors, Ineffective Habits of Financial Advisors (and the Disciplines to Break Them): A Framework for Avoiding the Mistakes Everyone Else Makes details proven techniques which allow advisors to transform their business into an elite practice: business analysis, strategic vision, exceptional client service, and acquiring high net worth clients. Told through the story of a purely fictional and completely average financial advisor, each chapter begins with an ineffective habit that is then countered with a discipline that improves business results and adds value. The book Details a step-by-step strategy for working through current clients, rather than relying on cold calling to form new relationships Includes anecdotes collected through both personal experience and stories relayed to him by clients and colleagues Provides question and answer segments, examples, and homework assignments Ineffective Habits of Financial Advisors (and the Disciplines to Break Them shows you how to deliver exceptional service while generating higher revenue per client.

From the Inside Flap Many of the seemingly harmless business habits that allow financial advisors to acquire enough clients to survive are, in reality, highly destructive to building a successful and satisfying business. Author, consultant, mentor, and former NFL coach Steve Moore knows why. In the past fifteen years, he's worked with more than 750 financial advisors, and, in the process, discovered the habits that most financial advisors make every day that ensure they remain average. Ineffective Habits of Financial Advisors (and the Disciplines to Break Them): A Framework for Avoiding the Mistakes Everyone Else Makes tells the story of Jack, a fictional financial advisor with ineffective habits that are all too true in the real world. The habits include: Living someone else's dream instead of your own Focusing on quantity rather than on quality of clients