



The Connected Advisor

Maureen Wilke

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***The CONNECTED Advisor: Eight Months to Building an Extraordinary Practice* provides the strategy, templates and scripts to brand a practice, deepen relationships, automate referrals and retain top clients.**

Maureen Wilke has worked with Fortune 500 financial services and insurance firms, including Morningstar, AXA, LPL, Guardian Life Insurance, RS Funds, banks, credit unions and the Money Management Institute, to help advisors and professionals build successful practices. Maureen Wilke's workshops, presentations, webcasts, videos and book are known for providing the "how to do it" using a proprietary system with proven strategies, templates, and tools.

The CONNECTED Advisor includes:

- an assessment tool to track and measure results
- the 80/20 client segmentation with tracking chart
- templates for creating your unique brand and service levels – Why You?
- social media strategies
- automating a 36-touch point client communications calendar
- client and prospecting events that win new business and referrals
- client reviews with scheduling techniques
- strategic partner and client advisory boards
- a special bonus chapter features how to "Capture the \$2 Trillion Retirement Rollover Market."

Endorsements for *The CONNECTED Advisor*

"I've known and worked with Maureen Wilke for many years. I personally have found real benefits in her program. Whether you're an advisor who is just starting out and needs a grounding in the basics, or an advisor who has hit a plateau and wants to break through to the next level, I believe Maureen's plan for building and growing your practice is a great resource." — Christine Nigro, President, AXA Advisors

"I've known Maureen Wilke for years. She's helped countless advisors become more efficient and grow, so if a bigger, more successful business is what you want, there's no better resource than *The Connected Advisor*." —Evan Cooper, Deputy Editor, Investment News

"The Connected Advisor program is a great nuts and bolts system for building a successful financial advisory practice. Every advisor, whether just beginning in the business or a seasoned pro, will glean important information from this book." — Leslie Banks, Senior Product Manager, Morningstar

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Barbara Bell:

The particular book The Connected Advisor has a lot associated with on it. So when you make sure to read this book you can get a lot of profit. The book was compiled by the very famous author. Tom makes some research ahead of write this book. This particular book very easy to read you can obtain the point easily after looking over this book.

Sam Current:

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