



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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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.

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