



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

**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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