



-----www.extraordinaryadvisor.com

The (Rest of the) Story

After a dozen years of law practice and then successfully wholesaling rather unique financial products (tax credits, partnerships, etc.), Kevin joined AIG to wholesale VAs almost 10 years ago. He quickly discovered the true commodity nature of these good but virtually identical products.

He recognized that he needed to sell uniqueness and so, emboldened by his then four years of participating in Dan Sullivan's Strategic Coach program, did something absolutely unheard of in the wholesaler circles and certainly wholesaler management.

He made himself the uniqueness niche and made his product secondary by offering his advisor-clients "The Deal". In exchange for a million dollars plus of VA business, they could participate in Kevin's trademarked 8-step "Extraordinary Advisor Breakthrough Process"™. Kevin created this program to help already successful, motivated and coachable advisors navigate with his help and repeatable processes through the entrepreneurial challenges and "loneliness" of being a financial advisor. It had nothing whatsoever to do with VAs or any financial product, let alone Kevin's VA. It was special entrepreneurial help that resonated especially well with "Extraordinary Advisors" he proactively targeted.

Ninety percent of his time was spent coaching, mentoring and speaking to his niche, the coachable extraordinary advisors, on topics that actually helped their overall practice, generated sales efficiencies, and made them a lot more money in a lot less time. The ensuing growth carried relationships and, of course, loyalty (hey, VAs are all the same anyhow, aren't they?... and they will be tomorrow, but what Kevin offered was and will be unavailable anywhere else at any price).



-----www.extraordinaryadvisor.com

Kevin took a severely “handicapped” variable annuity territory and began offering “Extraordinary Advisor” coaching seminars, helping his clients customize sales strategies based on their own unique abilities and naming their own processes; he was constantly connecting his clients with other resources for entrepreneurial growth unconnected directly to VAs; for example, he offered referral generation ideas and programs. His own personal website offered “The Entrepreneurial Tool Box” full of ideas, articles, and resources long before the phrase “added value” became the hackneyed mantra of bureaucratic marketing departments and automaton wholesalers. Included in his process are “The Mother of All Focusing Techniques TM” and “The Bombastic Referral Process TM”.

A funny thing happened. Within two years, Kevin had taken his “handicapped” territory and was awarded the AIG Sun America Wholesaler of The Year award for all channels: (banks, wires, and independents). This first-time VA wholesaler saw his production exceed every other one of AIG Sun America’s 100+ wholesalers because he targeted a heretofore unidentified market segment and delivered to them alone his unique coaching/mentoring skill.

Even though only 10% of his effort was dedicated to traditional wholesaling, he out-produced everyone else at AIG Sun America because he excelled at providing usable and customized entrepreneurial help that was not available anywhere else, and his Extraordinary Advisors rewarded him with their loyalty in selecting ‘his’ commodity.

Today, Kevin has resigned all of his licenses and begun an independent business to provide both his 8-step “Extraordinary Advisor Breakthrough Process” and what he calls the “Profitable Added Value Experience” to both Extraordinary Advisors AND those sponsors, vendors, wholesalers, B/D, and RIAs willing to concentrate on this Extraordinary Advisor niche; those “orbiters” learn how profitable providing the right kind of customized entrepreneurial help to the right, extraordinary, advisor can be.



-----www.extraordinaryadvisor.com

The market for this genre of help has grown since Kevin first adopted his ‘renegade’ strategy in 1999; to a large extent coaching has actually become commoditized given all the two-dimensional help, the books, the webinars, the ‘coaching’ programs, etc. that have flooded the market. There has not been elsewhere any recognition of or focus on this segment of the advisor marketplace, as Kevin defines it.

Kevin’s unique ability is to help personally in small groups or individually his niche of Extraordinary Advisors and those who would like to sell to them (vendors, sponsors), curry relationships with them (wholesalers), and support them (B/Ds and RIAs). He has proven that his style of entrepreneurial mentoring/coaching (“mentoaching”) can be employed to advance the business and profitability of both advisors and suppliers/supporters, if it’s properly customized. Kevin’s work is not “Off the Rack”.

He resigned all of his licenses in 2008 in order to make clear to all that his focus is squarely delivering profitable added value not necessarily connected to any product. No hidden agenda, no need to sell any commodity. Many suppliers, vendors, wholesalers and B/Ds, RIAs don’t know how to do this (or fear not making sales of their commodity always Issue One). Those willing to release the tight grip on the commodity-sales’ steering wheel, even a little, will enjoy a lot more money in a lot less time. Kevin’s unique ability is to help the coachable get that done and reward the vendors, wholesalers and Broker Dealers who participate in the delivery of Kevin’s value.

When Kevin speaks to B/D; RIA; or wholesaler conferences and road shows, the incredible value of his proven theory is delivered with dynamic passion born of having pioneered and practiced this approach for nearly twenty five years.



-----www.extraordinaryadvisor.com

His entrepreneurial speaking topics include:

-Simplifying Your Independence: Five Tools Extraordinary Advisors Use To Achieve and Leverage an Unfair Advantage

-Self Improvement for Financial Advisors: Hidden in Plain Sight

-World's Best, Most Creative, Entrepreneurial (Sales) Ideas and Processes

-Why, When and How to Quit

-The Profitable Added Value Experience (PAVE)

-The Ten No Go Zones