# Accelerate the growth of your Advisory Firm

For Strategic Partners



## The Big Question

 How will you identify, approach and engage high value prospects in 2025?



## 3 Steps to Building High Value Clients

- 1. Differentiate sales and marketing conversations
- 2. Identify a Problem Match and assess for suitability (MSO)
- 3. Use the MSO to create *cashflow* (that did not exist before) to help grow and protect the shareholders business and personal estates (with life insurance)



#### What is an MSO?

- A new entity taxed as a C-Corporation
- Provides services/value to the existing operating entities
- Services are paid via a management fee (Cash Flow)
- Management fee is deductible to the operating companies



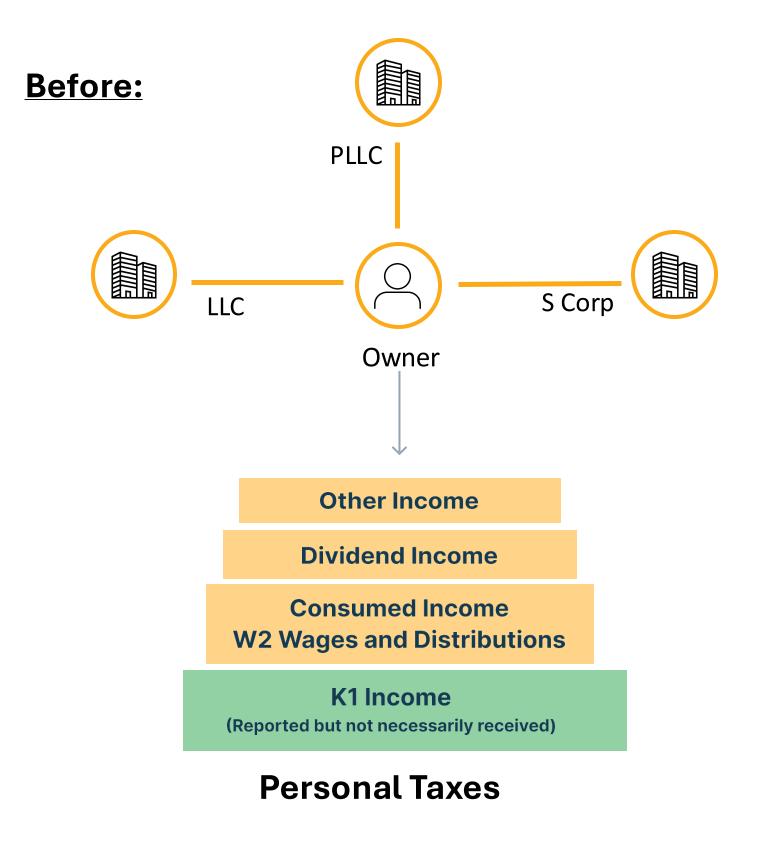
### Who does the MSO work for?

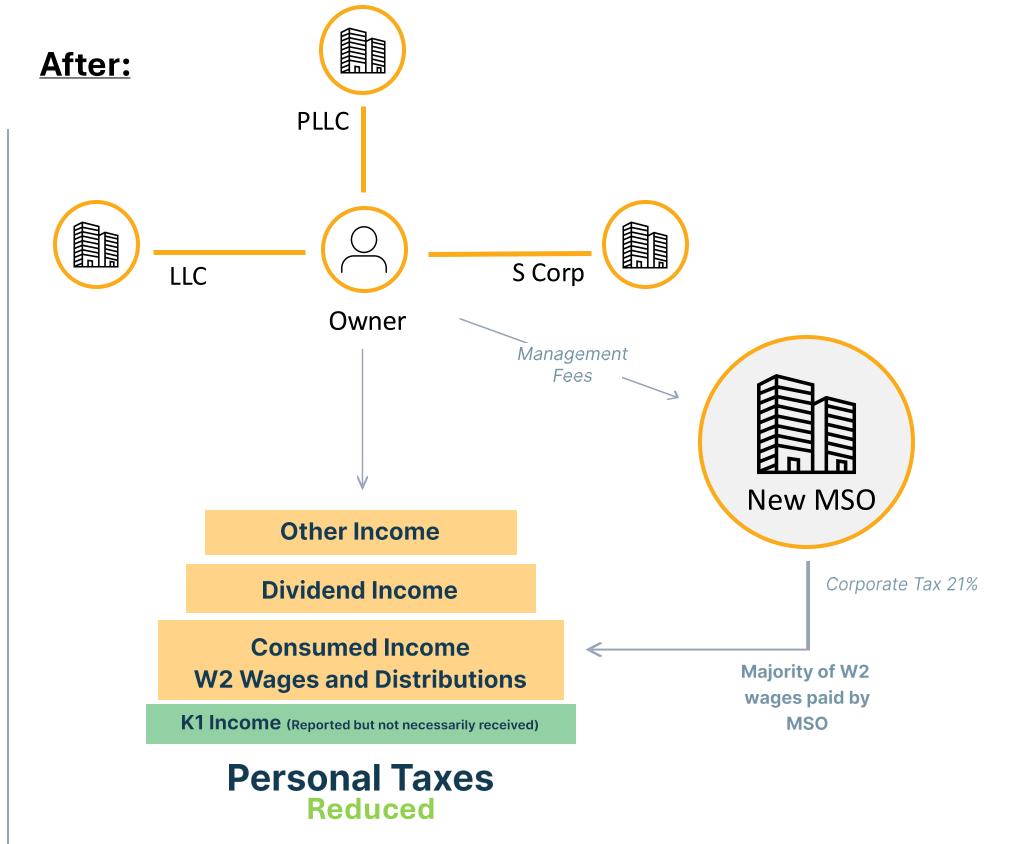
- Problem Match (Target Client)
  - Private business owner
  - \$2 \$15 M in profit
  - Frustrated with quarterly taxes
  - Need for business and estate planning



#### How Does the MSO Work?







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