MAX BOLKA

Comprehensive Business Consulting

Professional Speaking * Writing * Coaching

"Building First-Class Financial Advisors"

BACKGROUND

Max Bolka is a 27-year veteran of the financial services industry. After three years in the Investment Banking business from 1982-85, Max started his own Nationwide Financial Consulting and Investment Services firm, conducting hundreds of dynamic & motivating financial seminars from New York to Hawaii and abroad.

Today he **"builds first-class financial advisors"** by educating and inspiring them to increase both their level of professionalism and profits with his unique blend of wit, wisdom, vision and insight. Max teaches **comprehensive and detailed approaches** in every aspect of practice management; from goal setting and mission building, to business planning, sales, marketing, time management, stress reduction, the future of the financial services industry, and coping with market uncertainties.

To this day, he still belongs to a select group of practitioners who intentionally cultivated **a nationwide Clientele.** One of his marketing methods was voted the #1 most dynamic strategy in Financial Planning Magazine's February 2004 Cover Story on, "Top Ten Marketing Strategies." He shares these with other advisors through his coaching & mentoring program, teaching them how to remove self-imposed limitations, increase self-esteem, and allow their businesses to thrive and prosper.

CBC consists of **professional speaking, writing and coaching services.** Topics include:

Consciousness & Success: Success Is A State Of Mind
Creating A Step By Step Viable Business Plan For Your Practice
How To Get Pre-Qualified Referrals Who Are Expecting Your Call
The Big 10 Questions Every Client Is Thinking, Even If They Don't Ask
Natural Salesmanship & Relationship Management - Nice Guys Finish Rich
12 Steps Building A Great Practice // How To Define And Achieve Your Highest Goals
Marketing Magic - Getting The Clients You Want & Deserve // Time Mgt As Self Mgt
The 4-Step Financial Planning Initial Client Interview // The Future Of The Financial Services Industry

In addition, Max serves as an **industry consultant to institutions** such as mutual funds, broker-dealers, insurance companies and banks. He has worked with Chase, Franklin Templeton, Fidelity and Calvert among a long list of others. He also works directly with planners, investment advisors, CPAs and bankers through his Business Development Program.

Max's presentations focus on **both the inner qualities** of success, as well as **the outer skills** required to take one's business to the next level. Advisors acquire a new depth of understanding, empowering them to formulate & achieve their highest aspirations, both personally and professionally.

Each program is thought provoking, filled with real industry examples, insightful truths, and humor. Participants are inspired to expand boundaries, develop skills and retain the information presented. Audiences discover a renewed sense of purpose and direction including the **"what to do"** vision along with the practical "**how to do**" strategies necessary to achieve new levels of success. Most important, Max conveys "**how to be**" a great financial advisor.

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The Abundant Advisor

What do successful advisors who offer financial planning, life planning, asset management, socially responsible investing, or insurance products all have in common? Whether you create, preserve or protect wealth for your clients, or help them to live a financially more simple and organized life, in each case you are in the abundance business. Are you an Abundant Advisor?

Join The "A Team"

No, we're not talking about Mr. T here...Rather, we're talking about cultivating an Abundance Mentality that serves both you and your clients. As your client's financial advisor, in addition to being technically competent, you must walk your talk, as well as exude an air of abundance. We all get the clients we deserve. If you're not happy with your clientele and would like to upgrade, look to yourself and your own situation first. Is your financial house in order?

In addition to tracking your own Profit & Loss monthly, you should also update your personal Net Worth Statement quarterly. Just doing these two things will make a significant difference, because what you put your attention on grows stronger.

Cultivating An Abundance Attitude

Below are just some of the attitudes of Abundant Advisors. (Hint: If any of these *really* push your button, it may be an area you need to pay more attention to.)

Think Opportunity, Not Obstacle - More than just positive thinking, this attitude allows your creativity to flow, and creativity is a large part of what you're paid for; To creatively solve your client's financial problems. What is your initial reaction when ideas are proposed? Do you look for reasons why something cannot be done, or ways to accomplish it? If you make the choice to adopt an Abundance Mentality, then everything's an opportunity, even if it's just to learn from your mistakes. You always have a choice, and there's an upside to everything.

Life Is A Mirror - As with all phases of life, Abundance is a reflection of what's going on inside. Whether you are rich or poor, healthy or sick, organized or out of control, you are producing it. What kind of mental and emotional energy are you putting out? Are you confident or scared, generous or cheap, joyful or unhappy? Your degree of abundance is a direct result. If you're not getting the results you want, look within. (See "Examining Core Beliefs")

Growth - Your income can only grow to the extent that you do, and to the extent that you provide continually increasing value to more and more people. What can you do to increase your value?

Celebrate - Abundant people revel in other people's wealth and success. If you hate the fact that someone else is rich, you probably won't want to be like that person, and therefore won't be rich. Celebrating other's joy, wealth and success set you up to accept more of those in your own life.

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Gratefulness - Don't have enough time? Stop complaining! Don't gossip, don't complain and don't criticize, and you will pick up tons of time and energy. Again, what you put your attention on grows stronger in your life. For abundant people, everyday is Thanksgiving.

Let It Go - Thoughts carry energy. Positive thoughts carry positive energy and negative thoughts carry negative energy. If you want to have unlimited energy, think positive thoughts. Thinking positive does not come from exerting increasing amounts of willfulness until, denying reality until you get what you want. And it doesn't come from faking your way through life by affirming things you don't really think or feel. *Positive thinking comes from letting go of every thought and feeling that is not serving you well.* This sounds easy, but be forewarned. Your ego will come up with all sorts of reasons why you are right, why you should be entitled to your negative feelings. As Dr. Phil would say, "So how's that working for you?"....Let it go.

Become an Abundant Advisor, starting today. As legendary money manager Sir John Templeton encouraged, "Become a minister of prosperity and missionary of thrift."

Max Bolka is a 27-year veteran of the financial services industry who developed and served a nationwide clientele. Today he builds first-class financial advisors of all kinds through his professional speaking, writing and practice management coaching program. You can contact him directly at (800) 472-3288 or max@maxbolka.com