



Tested in the Trenches: A 9-Step Plan for Building and Sustaining a Million-Dollar Financial Services Practice

By Ron Carson, Steve Sanduski



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Tested in the Trenches: A 9-Step Plan for Building and Sustaining a Million-Dollar Financial Services Practice By Ron Carson, Steve Sanduski

Build a great financial services practice, AND a great life filled with passion, purpose and enthusiasm.

With more than one million financial services practitioners in the United States and Canada, competition for clients can be intense. While some professionals believe that working furiously around the clock at the expense of a personal life is the route to success, top-producing industry veterans Ron Carson and Steve Sanduski disagree. They believe that financial services is a commodity business, and as such, that performing better, delivering better financial plans, or having access to certain products doesn't differentiate advisors effectively. Rather, differentiating through service, brand and relationship is the only sustainable way advisors can compete.

In *Tested in the Trenches: A 9-Step Plan for Building and Sustaining a Million-Dollar Financial Services Practice* the authors explain how securities representatives, insurance professionals, investment advisors and CPAs can do just that . . . and create great lives along the way. Based on concepts taught in professional coaching workshops worldwide, *Tested in the Trenches* outlines:

- The four "foundation" steps to success.
- Four ways to generate revenue.
- 15 habits of top achievers.
- Forms and checklists to organize your financial services practice.
- Online sources for additional business-building ideas and tools.

If you have the sincere desire to make significant improvements in your financial services business – and your life – clear your schedule, read *Tested in the Trenches*, then go back and implement each idea in the order it is presented. By doing so you'll be prepared to join the rarefied group of personally fulfilled and professionally successful top achievers.



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Editorial Review

About the Author

Steve Sanduski, MBA, CFP®, has helped build three multi-million dollar businesses over the past 14 years. He is the Managing Partner of PEAK, a financial advisor coaching, software, and training company, and a frequently published author on financial and life-planning topics.

Ron Carson, CFP®, CFS, ChFC, is President of Carson Wealth Management Group, a comprehensive wealth planning firm and the founder of PEAK. With over 20 years of experience and more than \$1 billion in invested assets, Carson is one of the country's most successful and respected financial advisors.

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