

## **PRESS RELEASE - August 8, 2008**

BAI is pleased to announce **Mastery Series™ 3**: a new resource that has been created to advance the development of financial services businesses to a world-class level. Mastery Series™ 3 focuses on the issues that confront independent advisors as they grow their businesses. It builds upon the content of previously released Mastery Series™ 1 and 2 and is comprised of two new Modules (7 and 8).<sup>1</sup>

**Module 7** contains an overview of a tool called the Success Road Map® that is designed to help advisors establish an accountability culture within their businesses that is consistent with the core principles of Values-Based Financial Planning™. This Module explains how to create a Success Road Map® for every member of your team, with scripts as well as audio and video demonstrations along the way. It also describes how to develop Action Plans for each member of your team to help them to achieve their goals for the reasons that are important to them. Experience shows that firms that focus on their team members' goals significantly outperform firms that focus only on business goals and that, ultimately, team member satisfaction is considerably higher as well.

**Module 8** addresses the issue of how to create and maintain a Deliverables Team (the subject matter experts who support the clients' experience). Deliverables Team members may be internal or external to the firm and represent both technical and non-technical levels of expertise (*i.e.*, an estate planning attorney versus administrative support personnel). Most independent advisors struggle with how to identify, attract and retain members of their Deliverables Team. Module 8 provides a complete guide to accomplishing these tasks in a simple, focused manner. Like Module 7, Module 8 incorporates scripts as well as audio and video demonstrations to facilitate understanding and successful implementation.

Rebecca Everett, Vice President of Training and Development for BAI, said, "With respect to Mastery Series™ 3, Module 7 has been completed and Module 8 is in development and will be released no later than Q1 of 2009. We are extremely pleased to announce these advancements in helping independent advisors build truly professional practices."

Mastery Series™ 3 has been positioned as a \$1,000 investment but can be acquired now (prior to full release) for \$900 (with Module 7 being shipped on September 15<sup>th</sup> and Module 8 being shipped during Q1 of 2009). For additional information or to acquire Mastery Series™ 3, please call (800) 347-3707.

---

Bachrach & Associates, Inc. (BAI) is the leading professional development firm in the Financial Services industry with over 20 years of experience in creating and delivering world-class Programs, Resources and Services to fulfill its core Vision, Mission and Values. Its Vision is to transform the Financial Services industry into a true profession, and its Mission is to guide and empower Financial Professionals to create practices, built upon an earned foundation of unconditional trust, which help Clients achieve their goals and inspire them to explore and enjoy an improved quality of life. BAI is headquartered in San Diego, California, and it is proud to be an Institutional Member of the Financial Planning Association (FPA).

Mastery Series™ 1, Mastery Series™ 3, Success Road Map®, and Values-Based Financial Planning™ are the trademarks and registered mark of Bachrach & Associates, Inc. All rights reserved.

---

<sup>1</sup> Mastery Series™ 1 and 2 contained Modules 1-3 and 4-6, respectively