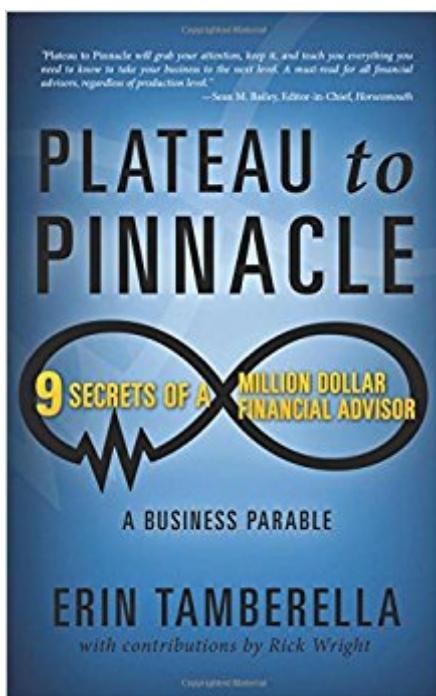


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# Plateau To Pinnacle: 9 Secrets Of A Million Dollar Financial Advisor



## **Synopsis**

Plateau to Pinnacle is the story of Luke, a veteran financial advisor who's been in the business for 10 years. Luke always assumed he'd be a million-dollar producer but hits a plateau that ends up lasting for years. He's grown complacent and comfortable until a devastating event shatters his entire world. Feeling lost and wondering how he'll ever recover, he meets a powerful yet mysterious mentor, Victor Guise. Victor teaches Luke how to systematize his business, and together they lay the foundation he needs to reach the goal he'd all but abandoned. Luke learns much more than just business from his enigmatic mentor. As Victor helps Luke recognize and believe in his own potential again, his business changes and in the process, so does he. The book is content-rich and advisor-friendly. It pulls the content from each chapter into an easy-to-follow, step-by-step checklist for systematizing the advisor's practice.

## **Book Information**

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## **Customer Reviews**

"Plateau to Pinnacle will grab your attention, keep it, and teach you everything you need to know to take your business to the next level. A must-read for all financial advisors, regardless of production level." --Sean M. Bailey, Editor-in-Chief, Horsesmouth "Plateau to Pinnacle is a great read! The story captivates you from the first page to the very last page of the book and it's a story every financial advisor can relate to. The to-do list at the end of every chapter pulls the important content from the chapter for you and presents it as an easy-to-follow, step-by-step process. The underlying message is also powerful and one we, as financial advisors, would be wise not to forget." -- Peter M. Maris, CFP, Principal and Wealth Manager, Resource Financial Group Ltd.,

Wilmette, IL "If you're serious about taking your business to a new level, you have to read this book. The story keeps you moving through the book quickly and if you take the time to develop and implement the 9 Secrets, success will be yours." -- Aimee, Senior Vice President, Ponte Vedra Beach, FL "The 9 Secrets are systems every advisor knows they should have and wishes they did have in their business. It's the storytelling and the way the content is presented in Plateau to Pinnacle that motivates you to actually do it. It can be a career changing book." -- Cindy, Vice President, Financial Advisor, Chartered Retirement Planning Counselor, Visalia, CA Plateau to Pinnacle is a great read! The story captivates you from the first page to the very last page of the book and it's a story every financial advisor can relate to. The to-do list at the end of every chapter pulls the important content from the chapter for you and presents it as an easy-to-follow, step-by-step process. the underlying message is also powerful and one we, as financial advisors, would be wise not to forget. --Peter M. Maris, CFP, Principal and Wealth Manager, Resource Financial Group Ltd., Wilmette, IL If you're serious about taking your business to a new level, you have to read this book. The story keeps you moving through the book quickly and if you take the time to develop and implement the 9 Secrets, success will be yours. --Aimee, Senior Vice President, Ponte Vedra Beach, FL The 9 Secrets are systems every advisor knows they should have and wishes they did have in their business. It's the storytelling and the way the content is presented in Plateau to Pinnacle that motivates you to actually do it. It can be a career changing book. --Cindy, Vice President, Financial Advisor, Chartered Retirement Planning Counselor, Visalia, CA

Erin Tamberella has experienced the daily challenges of a financial advisor firsthand. She spent 17 years as a financial advisor and three years as a producing branch manager. She holds a Bachelor of Science degree in Economics from the University of New Orleans. Her first month in production, Erin was diagnosed with cancer. She spent her first three years in the business balancing the challenges of being a rookie with bone marrow biopsies, chemotherapy and radiation. Erin attended the iPEC, Institute for Professional Excellence in Coaching in Chicago and is a Certified Empowerment Coach. In 2004, she started her coaching firm, Executive Transformations, Inc. In addition to coaching financial advisors from all over the country, she is also a regular Horsesmouth contributor and avid writer. Plateau to Pinnacle is her first industry-related book. Her next project is a business parable geared toward retirement planning for baby boomers.

Most fun I've had reading a business book ever! Author has a great story to make her points and share her wisdom. Surprisingly good ideas for advisors. I recommend a sequel. I want to hear more

from the mysterious Victor!

Very informative, and entertaining. I was in the brokerage business, but now I am the managing partner in a retail sales company. I learned many new sales techniques, and organizational ideas I can utilize daily. Some that I can also use in managing my employees. I strongly suggest this book to anyone looking for tips to improve their business skills. The author wrote a great story, filled with many interesting characters. I certainly could use a Victor in my life! All educational books should be written in this form.

Love this book. I have worked with a coach in the past and this narrative walks through many things that an advisor coach would while also providing a story line that is engaging in a mysterious Gatsby kind of way. Would recommend to any advisor as a refresher on managing your practice.

The best and simplest way to grow your practice! Easy to follow, great story -- where was this book 14 years ago when I started my practice?

This book is a great resource for anyone who is independent or thinking of going independent. All of the information contained within its pages are golden nuggets.

well written. keeps your attention the whole time

This book is for the advisor just starting out or the seasoned Financial Advisor looking to reenergize and reengage their business. Told in a unique story form, Plateau to Pinnacle engages the reader and offers tips, strategies and plans at every turn of the page. Excellent ideas and very motivating. Do yourself and your clients a favor and read this ONE! Michelle Arpin Begina, CFP, CIMA, RICP

Since I often spend so much time reading financial news updates and investment research, I rarely afford myself the time to read for pleasure. Fortunately, I took just a couple of minutes to read the first few pages of Plateau to Pinnacle, because it hooked me right away. I've enjoyed every second of reading this book. I found it entertaining and easy to read, but more importantly, it's helping me relearn the business in a way I can actually remember and implement. I like the way the end of each chapter is set up, because I plan to refer back to the book on a regular basis. •

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