



Author • Speaker • Motivator • Coach • Trainer • Mentor

The Bramson Report

April 2009

Table of Contents

- Memo
- What's New?
- Talking Points
- Resources
- Associates
- Ask Todd

Memo

Welcome to The Bramson Report! I am pleased to bring this to you. I look forward to being a resource to financial services advisors and financial services organizations. One theme of Bramson & Associates LLC is "Getting wisdom and information from those who have it...to those who need it." So, please enjoy this edition and many more to come. (In fact, why not set up a folder on your desktop, so you can save and organize this and future editions of The Bramson Report?!)

My intention is to brand my company as THE source for cutting edge marketing and practice management ideas and concepts that you can use. Because I also maintain an active financial services practice serving many clients across the country, I'm constantly seeking out the "Best Practices" ideas that I can use. If they work, I'll let you know. If they don't, I'll tell you that too. Even after 26 years in the business, I still have a thirst for finding and using the most efficient ideas that help me become better at helping my clients.

This e-newsletter is free so feel free to pass it along to others AND encourage your peers and colleagues to sign up. If this issue was forwarded to you, and you would like to receive future issues, please click [here](#) to sign up, or the SIGN UP HERE box in the left column, and we will be sure you do not miss a copy.

What's New?

On February 13-14th, I presented my 12 module training course to over fifty financial advisors in St. Paul, MN. This was videotaped by Bowman Media Group and we are working on the edits and graphics over the next few months. Thank you to North Star Resource Group for sponsoring this training series. While this project consumed my time for several months, I am really excited to take 26 years of experience and wisdom and organize this into a very concise and usable training series. In the upcoming editions of The Bramson Report, I'll keep you posted on the progress of this, including how to order, etc.

Here is a list of the twelve modules in this series:

1. Motivation, Marketing and Positioning
2. The Pyramid of Financial Needs
3. Referral Techniques That Work
4. Practice Management
5. Analogies and Stories
6. Life Insurance 101
7. Assembly Line Mind
8. Wisdom Versus Information
9. Embracing Technology to Save You Time and Money
10. Target Marketing
11. You Can Have It All
12. Partnering With the Media to Gain Instant Credibility

Affiliates & Links

SurveyMonkey.com
because knowledge is everything



ImediaPro

Kevin Hogan

Talking Points

This innovative section will provide you with some actual audio "Talking Points."

Here is a conversation with Todd:

What do you think about the opportunities for financial services representatives during this recession?



What is one specific idea that you think is timely?



Resources

As mentioned in the Talking Points section, I am recommending some specific resources with this issue.

First, I suggest going to Michael Goldberg's site at www.buildingblocksconsulting.com and order copies of his book, "You're Hired". Give this out to clients and prospects who have lost their job due to this recession. While there are many issues you can help them with, they are worried and scared about paying the bills and getting a new job. So, by providing them with an excellent resource for getting started with the job search process, you are meeting their main needs at the time. This should open the lines of communication for you to schedule a meeting to help them with their financial questions.

Second, for those who recognize that one of the best "investments" you can make now...is right back into your business - consider using one of the absolute best marketing tools available...a CD Rom introduction created by ImediaPro. I started years ago with their cassette tape version and have updated several times since then.

For any subscriber to The Bramson Report, or a new reader (if someone forwarded this to you), call ImediaPro's founder and creator Stephen Anderson directly at 1-800-226-9269. Tell him that "Todd sent you"! He will personally answer your questions and help you understand how his creative products can help you grow business.... just like they are helping me.

Opportunity

Lastly, I am currently offering an incredible opportunity to my "Associates Only" area of my website. Until now, this site has only been available to the following individuals:

- Contributing authors in a Real Life Financial Planning book
- Graduates of the Real Life Marketing and Practice Management Training Course

Now, until the end of April, you can join the "Associates Only" area and get an extra year membership. For \$300, you will have access to that site until 12-31-10, or a full 20 months! You will find over 150 Talking Points, Book Reviews, Excel and Word Templates of all the documents I use. To take advantage of this, go to the Store section at www.toddbramson.com and sign up as an associate. We will provide you with the password to access the site. So, after tax, your cost is roughly \$200, or \$10/month. This small investment will pay for itself in just your first visit there. Every month, I'm adding more content. For those who are serious about growing your business, this is one of the best investments you can make.

**I would like to receive The
Bramson Report**

[SIGN UP HERE!](#)

To unsubscribe to The Bramson
Report, please click [here](#).

Associates

For existing associates (explained above), I have recorded thirty more audio clips over the past few weeks. And, all of the Word and Excel documents and templates are finally there. You'll also find some PDF's of The Pyramid of Financial Needs, and many other useful documents that will help you as you grow your practice. Remember, this information on the site is copyrighted and you have permission to use it with your clients and staff only. Encourage your peers and colleagues to join, and check out the special offer noted above...for only \$10/month!

Ask Todd

Go to www.asktoddbramson.com and let me know what's on your mind? I'll answer your questions in the May edition of The Bramson Report.

Until then, remember the Chinese Proverb: "The man (or woman) who says it cannot be done...should not interrupt the man (or woman) doing it!"

The Bramson Report is a monthly e-newsletter brought to you by:

**Todd D. Bramson, President
Bramson & Associates, LLC
349 Wynnwood Drive • Verona, WI 53593 • 608-271-9100 • tbramson@aol.com**

Visit Todd's website!

www.toddbramson.com