

MATTHEW JARVIS, CFP®

Financial Advisor • Best Selling Author • Host of Top Advisor for Advisor Podcast • Coach • Stand Up Comic • Adventurer • Dad



THIS ISN'T YOUR AVERAGE SPEAKER | Create the lifestyle practice of your dreams.

Matthew Jarvis, CFP®, spent the first five years of his career struggling to survive, uncertain if he could pay his electric bill, and waking each day wanting to quit. A bear market forced him to 'burn' the proverbial ships and start on a different path. He was determined through whatever means necessary to not only stay in business but to create a profitable practice focused on delivering value to his clients while still being an involved father and husband, ultimately becoming one of the most successful multi-million-dollar lifestyle practices in the industry.

Matthew is on a mission to change the way financial planning is done. Through The Perfect RIA podcast, coaching programs, and his speaking engagements, Matthew shares his proven systems and processes to provide a better outcome not only for Financial Advisors and their families but their clients as well.

Matthew packs a powerful message to all in the financial planning industry: mediocrity knows nothing higher than itself, so to be exceptional, you must do what works. Through this message and by providing specific, actionable strategies, he has guided thousands of advisors toward improving and doubling their practices and creating the life they deserve.



TOPICS

★ Stop Playing Office

How to DOUBLE Your Effectiveness

Discover the do's and don'ts for creating what Michael Kitces calls a 'profitable, hyper-efficient lifestyle practice' while spending time out of the office that you desire.

★ Why Prospects Say NO and How To Fix It

Learn to identify which prospects are a good fit for you and your firm and create a process to empower them to make educated and informed decisions WITHOUT resorting to hard selling or begging for business.

★ Charging What You Are Worth and Graduating Clients

Take fee compression out of the conversation by ensuring you're delivering massive value and working with the right clients.

★ Deliver Massive Value To Your Clients

Set yourself apart from other advisors by implementing systems and tools to double your value and take your practice to the next level.

★ Overcoming Head Trash

Get rid of that mental clutter and deal with the nagging voice in your head holding you and your firm back from achieving greatness.

Focused, deep-dive sessions can be broken out from the above topics on implementing client surge meetings™, delivering quarterly value adds, tax strategies for financial advisors, delegation, and empowering your team.

APPEARANCES



"What's unique about Matthew, though, is his ongoing focus on increasing the overall efficiency and profitability of his firm first by systematizing his business processes in order to deliver even more value to his clients... and then raising his fees so that he's fairly compensated for the greater, more systematized value that he now delivers."

Michael Kitces, Kitces.com

"Jarvis's prospect process is the best process I have implemented in 25 years in this business. There is no better lifestyle practice to learn from than Jarvis Financial. Many "gurus" give advice, but Jarvis shares what works. His advice has improved my business more than anything I have done."

Todd Lester, Lester Financial Group

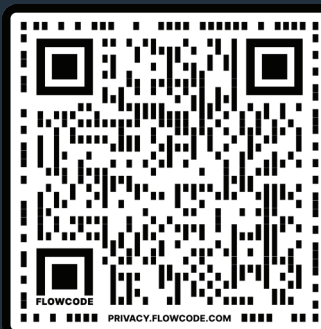
"Implementing surge meetings saved my firm! Before meeting Jarvis in 2017 and learning his strategy for surge meetings, I didn't think I could take on even a single additional client. I was already working around the clock, doing everything myself. Surge meetings, along with a lot of hard work, laid the foundation for tripling my revenue in three years and gaining control of my business."

Taylor Schulte, Define Financial

DELIVERING MASSIVE VALUE



If all the practice consultants and marketing experts have such great ideas to share, why aren't they using them to run their own successful practices? Delivering Massive Value outlines a system you can actually replicate to increase your efficiency, attract more A-level clients, and build the practice of your dreams.



**Book Matthew
& Elevate Your
Next Event**

