



Alternative Investment Insight & Education
Reviews and Comparatives

Maximizing Your ARC-Insight Account Sales Team INSIGHT

The Importance of Your ARC-Insight Profile

Building relationships of trust is THE MOST important activity you will be performing in your current position and for your entire career. Your ARC-Insight PROFILE is designed to assure that the correct information about your experience, your strengths and skills, and what type of person you are gets communicated to those who are most important for your success. Your ARC profile is how YOU get introduced to the advisors in your territory and to the broker dealers in your selling group.

When entering information into the fields of your profile, be sure you are thorough in providing your contact information including your correct phone numbers, email. Include your territory partner and what their contact information is in case you can't be reached.

Include how many years of experience you have with your firm and in the industry. This can add credibility to your worth to the advisor. In the narrative box just below your and your territory partner's basic contact information, use this area to elaborate on some of your special skills and experiences. Tell the advisor those areas you are especially knowledgeable in and what services you especially enjoy in helping the advisor with their clients. Provide some personal details about your family, your hobbies, and/or your special interests. There may be some mutual interests that could help a conversation get started or a relationship formed. Remember, the competition whose firm is not an ARC subscriber doesn't have the opportunity to provide this kind of information to their potential client's BEFORE an initial meeting.

Click each checkbox to assure you will be notified if there have been any searches on your program / company or if your program education module has been completed.

Include your FINRA licenses and identify any professional designations you hold.

Most importantly, check each and every state that is included in your territory. When you go to search for firm members (advisors) in your territory, whether it's for follow up, travel schedules, prospecting, etc., your accuracy in identifying your territory will dictate who you may view and have access to. This also controls what email notifications you receive generated by advisor's activities in the field.

Don't forget to click on **SAVE** when finished. Then select **VIEW PROFILE** so you can see how it will look to an advisor and also see if you may have missed something.

If you would like to have me help you complete your profile, please contact me and we'll schedule a call.

Ernie

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