



CREATIVE FINANCIAL GROUP
Financial Navigation To Help You Reach Your Lifetime and Legacy Goals

Dangers of Successful Producers & Practices

“Recognizing Opportunities is the First Step in Success”

- No mentoring opportunities
- No real marketing plan in place
- Lack of culture
- Lack of “A” clients
- Sub-par technology
- Expenses too high
- Lack of advanced training
- Not positioned as an expert
- Inadequate staff support
- Lack of experienced licensed staff
- Too much time spent with customer service
- Unclear Compliance Requirements
- No business continuation plan
- Need specialized training/CE credits
- Most of any income is from first year commissions
- Not enough residual/renewable income
- Lack of expertise/specialist infrastructure
- Lack of a professional environment
- No qualified lead generation program
- I do work that I should be delegating to others

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