

A New Breed of Wholesaler Services



Wholesaler  **Masterminds®**
Schedulers

services provided by Milrich Associates, LLP



For the first time ever, we have brought together the skills of a premier Scheduling and Virtual Assistant company with the leader in Wholesaler Practice Management Coaching and Consulting to form:



Why We Are Unique:

Wholesaler Masterminds Schedulers is founded by Rob Shore, a 30 year veteran of financial services distribution and the creator of the de facto online destination for wholesaler practice management content: WholesalerMasterminds.com.

Co-founder Melanie Koerperich's firm, Milrich Associates LLP, currently serves the virtual assistant needs of the financial advisor community...and beyond.

The Wholesaler Masterminds Schedulers team receives an unparalleled level of training and insight

SERVICES YOU'LL RECEIVE FROM WHOLESALE MASTERMINDS SCHEDULERS

- A dedicated scheduler who will provide services to only one wholesaler within a geographic region
- Real time calendar synced with your Outlook, Lotus Notes or Google Calendar
- Real time call log - you can check on progress anytime you wish
- Complete flexibility over how your hours are used
- Complimentary Basecamp project management room and assigned Project Manager

BONUSES FOR ACTIVE CLIENTS PROVIDED BY WHOLESALE MASTERMINDS®

- Exclusive invitations to upcoming quarterly *Practice Improvement Clinics* with Coach Rob Shore, reserved specifically for current scheduling clients
- Complimentary access to the current year version of the NEW Wholesaler Masterminds Rotation Builder
- 25% off the first month's retainer of *Priority Partner Preferred Coaching*
- 50% off discount code for *Brotherhood of the Bag, A Wholesaler's Handbook*

GETTING STARTED

Wholesaler Masterminds Scheduler services start at ONLY \$375 for 10 HOURS of scheduling

Clients who wish to purchase blocks of 40 hours SAVE \$250

Be sure to ask about our a la carte services:

- Advisor Recon Reports
- Rotation Builder Set-up
- CRM Input
- Email Handling
- Snail Mail Campaigns
- Expense Report Management
- Meeting Support and Planning

For information about Wholesaler Masterminds Scheduling contact Melanie at info@wmmschedulers.com or dial 888-507-0779 x101

Be sure to ask about corporate pricing!



p: 888-507-0779 f: 888-507-0691 e: info@wmmschedulers.com