

Bill Bachrach

Financial industry thought leader

According to Bill Bachrach, one of the most popular resources in the world for successful financial advisors, 'Trust has been, and always will be, the single most important thing that has to happen for two people to do business together, especially when it comes to money.' Trust determines a person's success or failure as a financial professional.

For over 25 years Bill has been teaching Financial Professionals around the world to speak the language of trust and the art of building high-trust client relationships.

A powerful and effective presenter, Bill has delivered well over 1,000 presentations for nearly every major financial services firm and association in the English-speaking world. This includes, at last count, 11x for the Financial Planning Association, 5x for Million Dollar Round Table (MDRT) and 4x for Top of the Table.

In 1988, after being a successful FA himself, Bill became the driving force behind the Trusted Advisor and Values-Based movements in the US financial services industry. Since then, he has earned the reputation as the world's leading authority on the subject of trust for financial professionals.

His books are industry best-sellers and his articles are published and republished in the industry's most-respected journals.

Financial Planning Magazine inducted him into their Hall of Fame as one of the industry's most influential people and the National Speakers Association inducted him into their Hall of Fame for his platform speaking skills.

Powerful content combined with excellent delivery are not two things that often go together. You usually get either industry expertise OR great presentation skills. Bill Bachrach delivers both. And his message is vital for every veteran who seeks to build a better clientele and every rookie who is serious about being successful.

If you want to achieve a deeper level of trust in your client relationships so they do all of their business with you, bring all of their assets under your management, follow all of your advice, and introduce you to everybody they know who could possibly be an 'ideal client' for you, then Bill Bachrach is the most qualified person to deliver.

Client Testimonials

You did an awesome job for us and we are very grateful! The feedback from Advisors has been truly extraordinary. The road show exceeded our expectations. Your energy, effort, and enthusiasm were visible and much appreciated. I can't thank you enough!

BT Financial Group

That was the best presentation I've heard in 15 years of attending meetings. I took 5 pages of notes. I've never taken so many notes!

Money Concepts Financial Planning Center

Bill Bachrach's programs are powerful, timely, and enriched with content designed to be meaningful to advisors serving all types of clients. His refreshing point of view and commanding style are tailored to motivate advisors, of all calibers, to achieve greater levels of success.

Lincoln Financial Services

I have been using the Financial Road Map® for many years. As a person who is obsessed with keeping track of what works I can tell you that I get hired 98.7% of the time that I conduct a Financial Road Map® interview. 77% of the time at the first meeting.

Nitro

In the past 2 ½ years I have conducted 80 Financial Road Map® interviews and acquired 32 Ideal Clients creating \$600,000 of recurring revenue as a result. I have absolute conviction we are doing the right thing for the clients.

Bruce Christie

I've been in the business over 30 years and that was the best presentation ever!

Michigan Financial Companies