

Q&A WITH BRYAN SWEET: The Draw of Peak Advisor Alliance and Excell Meetings

By Marie Swift

Marie Swift: Thanks for being here to talk about your experience as a Peak Advisor Alliance Member. We just completed the second full day of the fall 2014 Excell Meeting and are sitting in Ron Carson's private home office for a quick sidebar conversation while a number of other Peak Members are enjoying a nice dinner buffet and some of Ron and Jeannie Carson's favorite wines as a thank you for referring one or more colleagues to Peak Advisor Alliance. Please tell me who you are and how you came to be a part of the Peak community.

Bryan Sweet: I'm Bryan Sweet and come from Fairmont, MN. I've been a Member since 2006.

SWIFT: What first attracted you to Peak?

SWEET: I had seen Ron Carson speak at an industry function. Even at that point, he was kind of a legend but the message and the practice management and the skillsets he talked about – especially with "love affair marketing" – really got my attention. I felt that the things he was doing were things that would work really well with my firm's philosophy. So I just decided to join. I'm a big believer in coaching and actually have three different coaching programs I belong to. But for Peak, I decided to join for the practice management side of the business.

SWIFT: Interesting. So how does the coaching you get from Peak differ from the coaching you get from other organizations?

SWEET: I'm in Strategic Coach, which is more along the lines of developing strong entrepreneurial instincts and business owner thinking. We do a lot of retirement planning at Sweet Financial Services, so I am also in Ed Slott's coaching program. Peak is more about practice management processes and running your business efficiently.

The reason I think Peak is so effective is because Ron has done everything he talks about, at an extremely high level, if not the highest level. In fact, he's still working in the business, and he is sharing everything that he's learned from testing it on his own. This is quite a benefit versus working with somebody who's never been in the financial advisory business and is talking theory and saying, well, in an ideal world this would work good. Everything that Ron teaches, he's done. He and his team will tell you: this doesn't work, this does work. And that type of advice really helps those of us who aren't at his same revenue level to strive and work toward being there, too.

This creates the path of least resistance so we can get there quicker, because he's gone through the errors enough. If you follow what he says, you can cut time and get there quicker.

SWIFT: How long have you been a financial advisor?



Serving the financial services industry since 1993.

SWEET: December of 1979.

SWIFT: Okay so quite a while. Tell me a little bit about your firm.

SWEET: We actually have 14 staff members, including me. That's one of the keys. We've got a phenomenal team, which part of doing what Ron says and getting the right people in place. It's really allowed me to work on my three most meaningful things. I focus on what I do best and delegate the rest. It's worked really well.

SWIFT: How have you grown over the years?

SWEET: I started in the life insurance business in 1979. The Strategic Coach program got me to realize I didn't like insurance so I got out of that and started to do take a more investment-oriented approach. Just like the best athletes have coaches, so do I. I said I wanted to get better and be with the people I look up to. I need to do these things to hone some skills. Ron and his team have been helping extremely well with the practice management side.

SWIFT: As far as a broker/dealer, do you have one?

SWEET: Yes, I'm actually with Raymond James.

SWIFT: And you have your own firm; what's the name of the firm again?

SWEET: Sweet Financial.

SWIFT: Do you specialize in working with a particular kind of clientele?

SWEET: We specialize in retirement planning and we work really closely with business owners. We have a little niche dealing with women in transition. I have two female advisors on our team and we've created a concept called Smarter Women, which is an educational program. It's a long story but my neighbor, who is a really good friend, well unfortunately her husband passed away in a car accident. At that time, she'd never had much in the way of financial experience; In fact, she couldn't even put gas in her car. So we started Smarter Women to help others avoid some of the difficulties she had to go through.

SWIFT: How many Excell Meetings have you been to?

SWEET: I've been to every one since I've been a member. It's one of those things that unless there was a death in the family or something like that, it would not be one I would want to miss. It's such phenomenal information. Actually I told Ron earlier tonight this Excell Meeting is the best one he's ever had.

SWIFT: So that would be 8 years as a member. So would 16 Excell meetings for you be about right? [nods] Why is this one the best?

SWEET: From a business standpoint, we need to have a crystal clear vision where we need to go to get to our next level. Ron Carson is actually quite amazing. He thinks out of the box and is very futuristic. What he thinks and what really happens has a high degree of correlation. It's very fun to listen to what he is thinking and see that that's where the industry goes. It is helpful when you are evolving your firm.

SWIFT: So this being the best Excell Meeting yet for you out of 16, is there anything around the community and other people, besides Ron, that are part of the mix? Or about the spirit here?

SWEET: The great thing, and I'm sure you've heard this from other Peak members, is the sharing. Peak has this Million Dollar Advisor session, which is by-invitation-only the first day. You hear some phenomenal ideas and great concepts. If you hear something and asked if you could see all the documentation, people would just share that with you. That's great. If you have a particular issue, you can talk to all the people,. There are 400 members here today; so it's like having 400 team members trying to help you get better. It's really a fun experience. Some of the issues that have been discussed this time were things we were really hoping to hear.

SWIFT: Do you ever feel that there are competitors in the room, so much so that you would want to shut down some of your own sharing? Or do you ever feel that others are withholding a little bit?

SWEET: I've not ever noticed that with this group. I can tell you I've been to other gatherings where that's definitely very noticeable. But for the most part, with Peak, I've not had that feeling. Everyone seems to be open. We want to help each other get to some future level, to help our clients and build our businesses. Everyone has that big holistic viewpoint. There are some phenomenal people here, but their goal is still to continually do better. It's just a nice community.

SWIFT: And do you have a coach?

SWEET: Yeah, A.C.

SWIFT: That's the nickname for Amy Koenig, right? What is it about working with A.C. that you like?

SWEET: She wrote much of the information in the books that you originally use and learn from. She has been with Peak for about 10 years, so she has a very in-depth knowledge of Carson Wealth and what they do and don't do, so that's all really helpful.