



**GOALS PROGRESS STRATEGY™**  
YOUR FINANCIAL WORLD IN ORDER™

**GPS FINANCIAL SERVICE SYSTEM™**  
STANDARDIZE THE PROCESS, CUSTOMIZE THE EXPERIENCE™

**William S. McArthur, CFP® , CLU® , ChFC®**  
McArthur & Co. Financial Services



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# GPS FINANCIAL SERVICE SYSTEM™



McARTHUR & Co  
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CLARITY · CONFIDENCE · COMMITMENT

## Standardize the process; customize the experience™

Goals Progress Strategy™ is the foundation of all our work with our outstanding clients. For more than four years, Bill McArthur has developed, tested, refined, trademarked, and copyrighted this innovative and effective system of delivering comprehensive financial services. The result is a carefully crafted, and very flexible, process that helps us engage deeply with our clients in a way that is understandable, educational, and motivational. High standards with high touch!

This system is available now to you and other conscientious advisors who want to establish and deliver the utmost quality of professional planning services. Bill makes it easy and affordable for you to license, customize, and use this system. The result is that all your clients will have their “Financial World in Order™”. And in this new DOL Fiduciary world, you will have your professional practice in order.

Contact us with questions, to request a tour of Goals Progress Strategy™, to request a license application, or to pay for your license. Simply visit our website: [www.mcarthurandcompany.com](http://www.mcarthurandcompany.com). Place your cursor on Our Practice tab. In the dropdown box, click on Our GPS for Advisors. We look forward to helping you begin the journey with GPS!

## How the GPS Financial Service System helps you deliver exceptional value

- Comprehensive – GPS covers all aspects of your financial services
- Consistent – GPS provides a process in total alignment with your services
- Effective – GPS helps you attract new clients and Centers of Influence
- Simple – GPS is designed to be easy for you and your staff to implement
- Collaborative – GPS brings you together with a community of like-minded advisors
- Educational – GPS simplifies and clarifies complex topics for your clients
- Motivational – GPS inspires your clients to get on course and stay on course
- Professional – GPS delivers content and context that truly differentiates your firm
- Sensible – GPS is formatted as a paper and/or electronic presentation
- Flexible – GPS can be a one-page handout or a multi-page presentation
- Understandable – GPS uses everyday language and compelling graphics
- Viewable – GPS gives your clients material they can read without their glasses
- Adaptable – GPS is updated periodically to keep up with new concepts and regulations
- Profitable – GPS reduces your meeting prep time and your business overhead
- Customizable – GPS promotes you and your firm's brand on every page
- Expandable – GPS allows you to add your existing proprietary material
- Dependable – GPS is registered with the United States Copyright Office
- Affordable – GPS license and renewal fees are a fraction of its value to you

We look forward to showing you and your associates how GPS can work for you!



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## What others are saying about GPS

“Bill McArthur has accomplished something few firms in our industry have been able to do! The GPS Financial Service System will profoundly change both advisors firms and the experience clients have with those firms. Thoughtfully created and tested for years, this system is both comprehensive and customizable to allow any firm to implement a truly exceptional client service experience.”

Dana Marino, Vice President  
Director of Practice Management, AssetMark Inc.

“Extraordinary! What you’re doing is absolutely extraordinary. Your GPS system has such excellent formatting it provides an Advisor with the step-by-step tools to provide their Prospects and Clients with a total professional experience.

You’ve done the tough work of trying to figure out what to do and how to do it to have a top-of-the-line professional presentation and connection. The vision is here. The steps are here. The detail is here. This is well thought out and professionally delivered. Your GPS system may not solve all of the challenges an Advisor may face but it’s the best I’ve ever seen. Well done! Very well done.”

Doug Carter, Professional Coach  
Carter International Institute



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## And others...

“I’ve long admired Bill McArthur as a visionary advisor who builds deep and meaningful relationships with his clients. Bill’s GPS program provides a unique opportunity for other like-minded advisors to leverage his expertise in a fully turn-key package.”

Ron D. Cordes, Co-Founder & Co-Chairman  
AssetMark Inc.



- ❑ GPS Financial Service System complete with over 80 editable PowerPoint slides
- ❑ Professional customization and business branding for the GPS licensee
- ❑ Summarized and Annotated version of all GPS slides with tips on purpose and use
- ❑ PowerPoint electronic instruction guide that demonstrates how to work with GPS
- ❑ Three Essential Conversations™ based on training exercises developed by Doug Carter, one of the leading and most influential coaches of financial advisors worldwide
- ❑ Updates and new material for the GPS Financial Service System for one year
- ❑ Discounts on license pricing for multiple advisors practicing within one business entity
- ❑ Opportunity to purchase new GPS Modules at a discounted price for one year
- ❑ Access to Bill McArthur for technical and content questions for up to one year
- ❑ Option to renew a service agreement for GPS after one year and every year thereafter, entitling the licensee to continuing updates, access, and discounts