



# TEAM BEST PRACTICES

## Immersion System

### Build A Smarter, Better Advisory Team

**More than half of financial advisors today work in some form of team environment and the numbers are rising.** The good news is that advisory teams are outperforming solo practitioners in all key performance metrics. The bad news is that most teams struggle and fail to reach their potential with less than one in five reaching elite status.

**There are no secrets about why top advisory teams are highly successful.** They excel because of their unwavering commitment to Team Best Practices. Top professional athletes and elite advisory teams are successful for the same reason: their passion for the fundamentals of their professions. It's a pattern of behavior that gives them a deeper understanding of the essential practices that contribute to success.

The Team Best Practices Immersion System will give you insights into the methodologies utilized by the very best teams in the business. You'll learn the 7 Team Best Practices and how to seamlessly integrate them into your practice in ways that will help you build a smarter, better advisory team.

### Customized Team Building Approach

At Altius Learning, we know every advisory team is different. It's why our Team Best Practices Immersion System is custom designed to meet your team's individual needs.

In addition to our training workshop we provide customized coaching sessions designed to sync with the unique learning styles and preferences of your team. This level of personalization allows us to create a more effective, engaging coaching experience focused exclusively on your individual team's needs and priorities.

The ability to customize program content and delivery according to your team's unique requirements is the Altius advantage.



# Why The Team Best Practices Immersion System is Different

Advisory teams succeed when there is consistent execution of Team Best Practice fundamentals.

At Altius, we understand the process. Our Team Best Practices Immersion System is different because we keep your team continually focused on the basics.

Our team training system is designed to bridge the gap between knowing and doing. We utilize a proven formula for success which includes:



## Training

We teach how to make Team Best Practices repeatable habits.



## Customized Coaching

Implementation is easier because the coaching is customized to your team's unique needs.



## Accountability

We help your team set challenging yet achievable goals.



## Motivation

Our coaches provides encouragement and support to keep your team motivated.

## Expert Instructors

**Team Best Practice instructors are highly successful financial advisors and experienced managers.** With 30+ years of experience working for leading wealth management firms, they have hired, trained and mentored hundreds of advisors, many of whom have built multi-million dollar teams.

Altius instructors know how top financial advisors built their businesses and they will share those best practices with your team.

# The Benefits Of Team Best Practices

**1| Vision:** Only 17% of advisory teams have a strategic plan with clear goals and sense of purpose. It is about the same percentage of teams that are highly functional. We'll guide your team on how to design and implement a plan for success.

**2| Accountability:** Accountability is the thread that weaves individuals together into a high performance team. We'll show you how to integrate accountability practices into your team.

**3| Communication:** Efficient internal communication builds strong, productive relationships in a team. We'll guide your team on how to convey ideas and exchange information that elevates individual and team performance.

**4| Processes:** No team can achieve success without a "playbook" that outlines the procedures by which the team operates. We'll help you create a blueprint for a process-based practice that aligns your team resources with your goals.

**5| Hiring:** People are a team's most important asset. You'll learn who to hire, when to hire, what roles to fill and compensation guidelines.

**6| Leadership:** A common denominator of all elite advisory teams is strong leadership. You'll gain an understanding of how the best leaders inspire, motivate and direct their teams to reach their objectives and goals.

**7| Offering:** We provide your team with the tools and techniques necessary to refine and articulate your wealth management offering in ways that resonates with your clients goals and values.



# ADVISOR BUILT. ALTIUS DELIVERED.



## Here's What Advisory Teams Are Saying About Altius Learning:

**"Thanks to your coaching and advice I made changes to my team.**

I promoted my Team Financial Advisor to partner and since we have grown our revenue by 75%, our fee based assets have grown by more than \$30 million and we just crossed over the million dollar mark. Your coaching and training changed my life and my practice"

J.S. | Senior Financial Advisor  
Pepper Pike, Ohio

**"As a newly formed team, your coaching and training couldn't have come at a better time.**

The whole team is energized and we will be implementing all of your strategies to one degree or another going forward. We just signed a \$5 million-dollar relationship that will be \$7 million by the end of May! We still have another \$22 million in the near-term pipeline to close over the next couple of months. We are keeping the momentum going"

P.W. | Vice President-Wealth Management Advisor  
Stamford, Connecticut

**"This is a marathon not a sprint.**

I know that your plan is to start us out of the blocks at a strong gait. I appreciate all that you have done to help us continue to build our practice. We look forward to a tremendous amount of success as we continue to employ your tried and true training and coaching techniques."

N.B. | Senior Financial Advisor  
Denver, Colorado

## Elements Of The Team Best Practices Immersion System

### Objective

Increase your productivity by integrating the components of Team Best Practices into your team's culture.

### Best Practices Workshop

One day interactive workshop that presents Team Best Practices and strategies for achieving maximum team performance and productivity.

### Methods

A combination of a group training workshop followed by three months of customized individual team coaching sessions. Coaching is focused on the implementation and execution of the 7 Team Best Practices.

### Workshop Size

3-5 motivated financial advisory teams. Each team can include one support person.

### Participant Cost

Pricing available upon request.





**ON YOUR MARK.  
GET SET.  
GO!**

If you're ready to join, build or manage a high performance advisory team, the Altius Team Best Practices Immersion System is your roadmap to success.

Integrate the 7 Team Best Practices into your efforts and join the elite teams that set the standards of achievement.



**ALTIUS LEARNING**

1830 Prospector Ave. | Suite 1 | Park City, Utah 84060 | [info@altiuslearning.com](mailto:info@altiuslearning.com) | 888.569.0586

[www.altiuslearning.com](http://www.altiuslearning.com)