



# The Providing Value Strategies

## 3 | **Assets Away and Expanding Wallet Share**

One of the most effective ways to increase revenue is to bring in new assets from existing clients and expand wallet share. This presentation provides the Altius expansion formula which when implemented will provide one of the most productive and time efficient ways for advisors to grow their practice. This program demonstrates how to acquire new assets and expand wallet share with existing clients.

## 4 | **The Power of Niche Marketing and Prospect Pipeline**

These two strategies are among the most effective and productive acquisition strategies. In this presentation we provide specific tactics on how to develop a niche market and leverage that effort to acquire new assets and clients. We also describe how to effectively build and manage a prospect pipeline to generate 5 to 10 individual Million Dollar+ clients per year.

## 5 | **LinkedIn**

LinkedIn is the most powerful lead generator available to financial advisors when used effectively. Altius teamed up with dozens of top producing advisors who utilize LinkedIn as their number one client development tool. The focus of this presentation is to share Altius' 8 LinkedIn Client Acquisition Tactics and provide advisors with step-by-step instructions on how to immediately implement them.

## The Altius Difference

Altius Learning works exclusively with wealth management professionals. Our niche is precise - practice management with an emphasis on client acquisition. We show wealth management professionals how to turn their potential into peak performance. It's what we do. It's all we do.

Our coaches average 30+ years of experience as top performing advisors, managers, mentors and thought leaders at some of the largest, most respected financial institutions in the world. They are second to none in the depth of their knowledge and breadth of experience.

**"I have used the referral/introduction pitch a number of times and I now have received 6 qualified prospects and scheduled two meetings. Clearly, this process works! Thanks for the coaching."**

A.P. | Denver, Colorado

**"To date somewhere between \$15 million and \$17 million in new assets have hit our books."**

This was all due to a combination of client referrals and held away assets being given that final push and making their way into existing accounts."

E.A. | Connecticut