



The Providing Value Series from Altius Learning

The Opportunity

All financial advisors know the imperative of proactively reaching out to existing clients to provide advice and guidance. But what about others who may not be benefiting from the quality of their advice? In any profession knowledge matters. Knowledge alone won't guarantee success. Clients don't pay advisors for what they know, they pay them for what they do. At Altius Learning, we show advisors how to put their knowledge into action. Advisors can set themselves apart from their competition and "seize the moment" by applying Altius Learning's proven acquisition strategies.

The Approach

Altius Learning has created a series of five, 45-minute programs to assist advisors with the acquisition of new clients and assets in a virtual environment. Our approach is tactical and practical, each program provides advisors with actionable steps they can implement immediately in their practice. To be the best, you must learn from the best. We know what works, why it works, and most importantly how it works because we did it ourselves in our highly successful financial careers. Altius Learning has a long history of helping advisors grow their practices. These programs are designed for a broad audience of advisors.

The Providing Value Strategies:

1 | **Client Referrals**

The majority of loyal clients are willing to provide referrals and yet most advisors don't have a proactive referral process. The focus of this presentation is to share Altius' proven 4-step referral process which has a 30-40% success rate. This presentation provides the participants with scripts and a complete approach to develop a successful referral process.

2 | **Transitioning Affluent Personal Relationships**

This presentation provides specific tactics and scripts on how to effectively convert affluent personal relationships into prospects and ultimately to clients. Advisors are frequently challenged with how to approach personal relationships on working together professionally. We show Advisors how to employ the Top Advisor Mindset to transition social connections into prospects and ultimately clients.

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