REFERRAL IMMERSION SYSTEM

For Experienced Financial Advisors

Find, Engage and Acquire Affluent Clients

You've done the hard part. You've established a solid foundation for your financial advisory practice. And you're earning a decent income. But now you're realizing the search for new and bigger clients is never-ending, and it doesn't necessarily get easier.

Here's the good news. Advisors who have success acquiring new clients aren't born; they're trained.

They don't rely on luck; they use proven tactics. They don't just work hard; they work smart.

How valuable would it be to your practice to generate 8+ qualified referrals in 3 ½ months?

Converting half of those referrals to clients would provide 4 to 5 new affluent households over several months. Using our processes, we show you how to generate 8+ referrals in less than 5 hours of your time.

Altius Learning has trained and coached thousands of advisors to acquire new affluent clients and we have found our client referral strategy is the most efficient approach to generating new relationships.

"As I mentioned on our call today, we learned a great deal in your workshop. I incorporated your recommended techniques into a dinner conversation and I now have a $1mm plus household! Thank you for all that you have done to increase our focus. Your workshop boosted our confidence and effectiveness in dealing with prospects."

D.S. | Menlo Park, CA

PROVEN CLIENT REFERRAL STRATEGIES

The most successful advisors utilize eight steps for a winning referral strategy.

The Referral Immersion System will teach you these tactics and show you how to put them into practice for career changing results. They include:

1 | **Developing Loyal Clients**
Your best advocates will be your most loyal clients.

2 | **Qualifying Referrals**
We demonstrate how to acquire the right referrals from your clients.

3 | **Client Objections**
We address potential client responses to the referral conversation.

4 | **Value Proposition**
Your value proposition is critical to assist clients in advocating for you.

5 | **The Altius Process**
Master our four-element proven referral process.

6 | **Referral Brainstorming**
Learn to effectively conduct a referral discussion with your clients.

7 | **Optimizing LinkedIn**
An in-depth examination of how to use LinkedIn to generate referrals.

8 | **Prospect Pipeline**
Utilize a proven prospect tracking system to convert referrals into clients.

"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

The Referral Immersion System Is Different

Elements of the Referral Immersion System

OBJECTIVE

Significantly increase new affluent client acquisition results with a goal of at least 10 new affluent clients and $10+ million of new client assets in 12-months.

GROUP SIZE

8 to 10 motivated financial advisors.

TARGET PARTICIPANTS

Past participants of our Acquisition Immersion System (AIS) or experienced advisors who want to develop a highly successful referral strategy.

METHODS

A combination of workshop and group coaching sessions focused on execution of eight proven referral tactics.

ACQUISITION WORKSHOP

Our one-day workshop provides a baseline for achievement of referral goals.

IMPLEMENTATION COACHING

Seven bi-weekly one-hour sessions beginning two weeks after the workshop. Group coaching reinforces referral strategies, while providing specific implementation techniques and guidance in overcoming challenges.

ACCOUNTABILITY

Each advisor sets personal annual referral goals and participates in 3 ½ months of bi-weekly reporting to measure results versus goals.

Ask most financial advisors how they can grow their business, and they'll provide you with a long list of ideas. Ask them how many of those ideas they regularly implement, and you'll likely only get excuses.

The Referral Immersion System is different than other business development programs because we bridge the gap between knowing and doing. Our proven formula for success includes:

Training

We teach you how to put proven referral strategies into practice.

Coaching

We help you overcome the inevitable challenges of implementation.

Accountability

Together, we set monthly goals and milestones you commit to meet.

Sustainability

We give you the confidence and tools to keep applying what you've learned long after you've completed the training. These elements provide participants in the program precisely what they need to crack the code of client acquisition.

Expert Instructors

The Referral Immersion System instructors have been highly successful financial advisors and experienced managers.

They are talented professionals, each with 30+ years of leadership experience in the financial services industry. They have hired, trained and mentored hundreds of financial advisors, many of whom are million-dollar plus producers. Their insights come from firsthand experience and personal observation in the field. They know how top financial advisors acquire affluentclients and will share those prospecting best practices with you.

ALTIUS LEARNING

If you're ready to find, engage and acquire new affluent clients and assets, the Referral Immersion System is for you.

Apply the strategies you learn immediately to set up your practice for long-term growth and prosperity. Put your practice on the growth track that you know is possible. Speak with your manager for dates and specifics on participating in the Referral Immersion System.

ALTIUS LEARNING

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