



Coaching

Our instructors will share with you their deep expertise and experience in client acquisition to help you overcome the challenges of prospecting for new clients.

Training

You will learn proven, strategies and tactics that funnel a consistent, predictable flow of affluent clients into your practice.

Accountability

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

Sustainability

We will give you the tools, skills and confidence to effectively apply what you learned long after you have completed the program.



Elements of the Altius Learning SMART Marketing Process

The SMART Marketing Process is designed to help you find the right client acquisition strategy for your practice. You'll improve your ability to identify appropriate prospects, build rapport, and earn their business.

The five steps of SMART Marketing include:

- **Selecting** - How to identify your natural markets or niches, through self-assessment.
- **Marketing** - How to use the advice asking process to get face-to-face meetings with qualified prospects in your chosen niche.
- **Affiliating** - How to improve your effectiveness in building rapport (trust and affection) with prospects.
- **Responding** - How to effectively convert your prospects into clients.
- **Triggering** - How to leverage current client relationships into opportunities for introductions to additional affluent prospects.

Learn the techniques and scripts used by some of the industry's most successful advisors.





Turn your potential into performance.

Success does not come automatically to advisors with potential. There are many high potential advisors who struggle. Success comes to advisors who learn how to transform their potential into performance.

Helping advisors transform potential into performance is what we do. It is all we do. Speak with your manager for dates and specifics on participating in the SMART Marketing Process.



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