



SMART Marketing For Growth-Focused Advisors

SIMPLIFY YOUR CLIENT ACQUISITION. AMPLIFY YOUR RESULTS.

Most financial advisors have a love-hate relationship with client acquisition. They love marketing when it brings in new business, but they hate it because it is difficult, it can be perceived negatively and it's time-consuming.

While most advisors consider client acquisition a double-edged sword, one thing is certain – it is an essential activity for growth-focused wealth management practices. The battle for new clients has never been more intense but the opportunity has never been greater. However, evolving investor expectations will make acquiring new clients even more competitive in the days ahead.

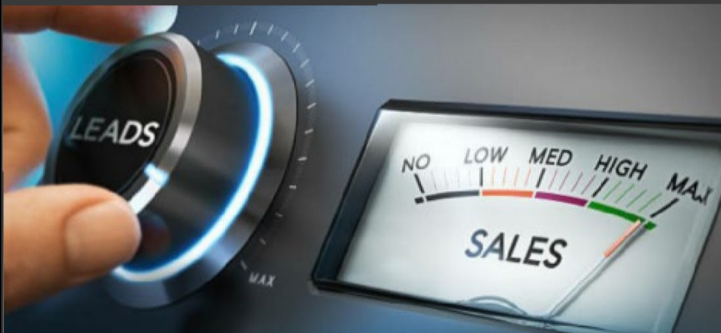
Advisors acknowledge the importance of prospecting for new business but most struggle with marketing because it takes them out of their comfort zones.

Accelerate Your New Client Acquisition Rate

Top advisors have a different perception of marketing. They understand what it is, how it works and moreover, they make it an activity they perform regularly with consistency and conviction.

What makes SMART Marketing unique is the ***advice asking process***. We are all flattered when someone asks us for advice and this technique capitalizes on that human emotion. You will master how to employ the ***advice asking process*** with clients, prospects, and acquaintances. Asking a person you know for their advice is a powerful and proven client acquisition method. We'll show you the step-by-step process used by high-performing advisors to identify prospects and build meaningful relationships with them.

The Altius Learning SMART Marketing Process is specifically designed to simplify and accelerate new client acquisition. Our program begins with a one-day (5-hour), highly interactive workshop. It is lead by Altius coaches and followed by 3+ months of intensive coaching. The Altius Learning SMART Marketing Process enables advisors to become more successful in client acquisition, and to fully benefit from the considerable opportunities in today's financial environment.



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.





Find your Natural Market. Penetrate it. Dominate it.

Advisors who fall short at client acquisition do so for various reasons, including:

- Their target market is too broad.
- They cannot clearly articulate their value proposition.
- Their marketing efforts are inconsistent.
- They are unable to favorably differentiate themselves.
- Their marketing message is not distinctive.
- They find it difficult or distasteful.

Top advisors take a different, more strategic approach to client acquisition. They position themselves as specialists instead of generalists. They identify their niche, drill deep into it and they continually develop the unique expertise and relationships that enable them to dominate it.

Advisors who utilize niche marketing earn upwards of 50% more than their generalist peers.

Serving a highly defined market ignites the full power of the advice asking process. It enables advisors to craft value propositions that are distinctive because they clearly and succinctly explain the unique, exceptional benefits they provide to their market.

Expert Instructors

Our SMART Marketing instructors are subject matter experts in the advice asking process. Each of them has 25+ years of experience as highly successful advisors and managers at some of the top financial services firms.

Their first-hand experience in helping create and grow niche-focused financial practices will help you accelerate your acquisition capabilities to a level you are unlikely achieve on your own.

Objective

Provide advisors with client acquisition skills to create, grow and sustain a highly profitable, wealth management practice.

Group Size

8-12 motivated, growth-oriented advisors

Methods

Combination of highly interactive workshops, 1:1 and group coaching sessions.

SMART Marketing Workshops

Our 5-hour interactive workshops are conducted either virtually or in-person.

Implementation Coaching

Seven 1-hour sessions every other week beginning 2-weeks after the workshop. Group coaching reinforces acquisition strategies, while providing specific implementation techniques and guidance in overcoming challenges.





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.



ALTIUS LEARNING

1830 Prospector Ave. | Suite 1 | Park City, Utah 84060

info@altiuslearning.com

888-569-0586

AltiusLearning.com