



**GROW YOUR BUSINESS**  
**ACCELERATE YOUR SUCCESS**

**Results-based Coaching for Financial Advisors**





# ARE YOU READY

## **Discover Your True Potential**

**The world of financial advisors is a crowded place.** Making your mark takes talent and hard work. But for those striving to join the ranks of the elite, another element often makes the difference – *coaching.*

The right personalized training can be the difference between an average financial advisor's career and an extraordinary practice.



# TO STEP UP YOUR GAME?

**Altius Learning offers coaching to financial advisors ready to step up to the next level.** In the same spirit that top athletes consult with experts to sharpen their skills and achieve their goals, our coaching programs will help you make quantifiable leaps in performance. You'll take deliberate actions to reach your fullest potential and build a foundation for long-term success.

## Make Changes, Get Results

If you're doing the same thing over and over, don't expect different results. To get a different outcome, you need to make changes. But what to change and how isn't always obvious.

**The Altius Learning coaching program removes the guesswork.** We start with a thorough analysis of your current business and tell you precisely what to do to improve your practice. We'll provide you with all the training and tools you need to move forward with confidence. Our coaching will help you:

- **Acquire new high net worth clients**
- **Grow assets under management**
- **Deepen the loyalty and engagement of existing clients**
- **Increase your productivity**
- **Gain control of your practice, become proactive vs. reactive**
- **Move past performance plateaus**
- **Boost self-confidence, self-esteem and motivation**
- **Improve your work-life balance**
- **Bridge the gap between where you are now and where you'd like to be**

### WHAT OUR CLIENTS ARE SAYING

"Just talked to one of the main CPA pipelines you and I spoke about. Told me it's good I'm local, and they are sure they will have clients they will refer to me. **They love my operation and style. Thank you. We are going to rock 2013!**"

— R.M.

Altius Learning will guide you to grow your practice, create value for your clients and enjoy a more rewarding career.



# QUALITY COACHES ARE THE DIFFERENCE

The success of your coaching experience largely depends on the quality of your coach.

At Altius Learning, every one of our coaches has actual experience in the field. We're not academics or life coaches. We have been highly successful financial advisors and senior executives. Each of us is a seasoned professional with 25-30 years of experience at top companies in the financial services industry. We have hired, trained and mentored hundreds of advisors. **Our insights come from firsthand experience and personal observation in the field.**

We've distilled what works into best practices and are prepared to share them with you. We're coaching specialists with a narrow focus: helping financial advisors and their teams build million-dollar and multi-million-dollar practices.

## Action-Oriented Plans

**Knowledge is power but only when it is applied.** You need the right information from the right teacher, someone who can translate the concepts into step-by-step plans and hold you accountable to follow through.

**Altius Learning takes a tactical approach to coaching.** In our program, you won't spend time dealing with textbook theories or esoteric philosophies. Our methods are extremely pragmatic and tactical. Together, we'll create a detailed blueprint for your business and then put words into action.

We'll inspire you to do better than you know how.

Through continuous reinforcement, personalized feedback and purposeful accountability, you'll achieve measurable results that increase your client assets and your personal effectiveness.

SHARING OF  
BEST PRACTICES

INSPIRATION

OVERCOMING  
CHALLENGES

ACCOUNTABILITY

“We just had a great team meeting to discuss our final business plan. We want to compliment you on what a superb job you’ve done capturing our strengths and weaknesses and identifying what changes we need to make to reach our goals. Thank you so much!” — N.G.

## Everything You Need for “How To”

Altius Learning’s coaching programs require a one-year commitment, although most clients choose to continue beyond the one-year mark. The majority of our communication will be in monthly meetings, typically 60 to 90-minute conference calls. The calls are productive, interactive exchanges that follow a detailed agenda.

We’ll cover two dozen topics encompassing business development, business management and wealth management. You’ll also learn to embrace the **13 Success Principles** common to top financial advisors in the industry.

With our tactical-based model, we provide all the tools and techniques you’ll need for implementing what you learn including:

- **Step-by-step instructions for growing your business**
- **Scripts for converting affluent relationships into clients**
- **Strategies to identify and approach referral sources**
- **Techniques for better time management**
- **Processes to improve efficiency**
- **Methods for optimizing team interaction and performance**
- **Formulas and metrics to quantify results**
- **Overcoming implementation challenges**
- **Sharing proven best practices**

Why spend time developing your own systems and creating your own materials, when we can provide you with ready-to-implement tactics already proven to work?

### WHAT OUR CLIENTS ARE SAYING

“I wanted to say ‘thank you’ one more time. Our Professional Alliance CEO Event was a huge success. We had 50 guests — all business owners, CEOs and other C-suite executives and entrepreneurs. One of Dave’s friends also attended and has a net worth well over \$1 billion. We now have four strategic partners and have added two new members. **We agree with you that referrals will come naturally as we communicate what we do by providing specific examples.** You have changed my life, and for this I will always be grateful.”

— N.G.



"I met a plastic surgeon at a black-tie event and used the lines you suggested. He emailed me back the following day with a 'yes' and a note I wanted to share with you: 'I would enjoy hearing more from you. I am inherently cautious, but ultimately I know I need some advisement.' Thank you!" — P.L.

## 1:1 Coaching - Annual

This intense, personalized program is for advisors who want to break away from the pack. It begins with an in-person baseline assessment and thorough practice analysis that provides a roadmap for significantly improving your performance.

An annual 1:1 coaching experience leads to the development of a unique value proposition in which you define the value you bring to your clients. You'll discover how to connect with them emotionally, rationally, and experientially to stand out in today's competitive environment.

Finally, you'll refine your business model and seek opportunities to build your brand and your practice. Be prepared to work hard, relinquish old behaviors and open your mind to new ways of thinking.

## 1:1 Coaching - 6-Months

A 6-month plan is for the advisor who wants to focus on only specific elements that are challenging their practice. This personalized and focused coaching experience allows the participant to select from over 25 specific topics. It begins with an in-person baseline assessment followed by sessions that are held monthly over six months.

**Whether you choose the annual or 6-month 1:1 coaching program, you can expect a solid return on your investment.**



# CHANGE THE TRAJECTORY OF YOUR CAREER

You can spend your time reading books and attending seminars. But if you lack the specific know-how to implement what you learn and accountability to follow through, you won't see results.

Lasting change is difficult to do yourself. If you're truly motivated to grow, you need a coach.

## Are You a Candidate for Coaching?

Altius Learning coaching is for sharp, ambitious financial advisors who have already achieved a measure of success on their own but want to get to the next level.

Ask yourself if these five qualifications apply to you:

- 1 | I have high professional standards and personal integrity.
- 2 | I want to be of maximum value to my clients.
- 3 | I'm open to new ideas and direction from others.
- 4 | I'm willing to step out of my comfort zone.
- 5 | I'm committed to doing whatever it takes to reach my goals.

## There's no such thing as a silver bullet.

We focus on the execution of proven fundamentals that work well when implemented.

## Contact us today for a free consultation.

No cost. No obligation. No hard sell. Just the facts about how coaching can change the positive trajectory of your career. Contact us at [coaching@altiuslearning.com](mailto:coaching@altiuslearning.com) or call us at 888.569.0586.

### WHAT OUR CLIENTS ARE SAYING

**"I had a big win regarding the new relationship with Jacques.** As you suggested, I have been following up with him on a monthly basis since our first meeting, and today we are transferring in \$1.2 million. He also is willing to refer other individuals at his company for me to help with their finances. Thank you!!!"

— F.E.





Elite athletes know professional coaching is essential to their success. **Elite financial advisors do too.**

Don't spend another day wondering how you can get from where you are today to where you want to be. Altius Learning can take you there.

Contact us today for a free consultation.



**ALTIUS LEARNING**

1830 Prospector Ave | Suite 1 | Park City, UT 84060 | [info@altiuslearning.com](mailto:info@altiuslearning.com) | 888.569.0586

[www.altiuslearning.com](http://www.altiuslearning.com)