THE ACQUISITION 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. The Acquisition Immersion System by Altius Learning will teach you winning strategies that can add 10 new affluent clients and $10 million-plus to your practice in just a year and sustain that pace going forward.

Our program begins with a one-day, highly interactive workshop led by an Altius expert, followed by 3 months of intensive coaching. The Immersion System assures your successful implementation of proven, client acquisition strategies

Seven Proven Acquisition Strategies

The most successful advisors apply seven fundamental acquisition strategies. The Acquisition Immersion System will teach you these tactics and help you put them into practice for career-changing results. They include:

1 | **Personal Referrals** Develop a proactive referral system that turns your acquaintances and clients into your personal sales team.

2 | **Professional Referral Network** Learn how to implement the five-step process to becoming the go-to financial advisor that CPAs and attorneys refer to their clients.

3 | **Event Marketing** Discover how to organize special events that attract potential clients.

4 | **Niche Marketing** Use our four-stage process to choose a specialty and beat the competition.

5 | **Right Place, Right People** Employ proven strategies to transition your affluent personal contacts into clients.

6 | **Assets Held Away** Add millions to your practice when you apply our four-part technique for persuading clients to transfer their assets to your management.

7 | **Pipeline Management** Learn how to build a pipeline of 50 quality prospects from which you'll generate 10 new affluent clients every year.

Why the Acquisition Immersion System Is Different

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 Acquisition 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 acquisition 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 Acquisition Immersion System instructors have been highly successful financial advisors and experienced managers. They are talented professionals, each with 25-30 years of experience at top companies 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 affluent clients and will share those prospecting best practices with you.

Here's What Financial Advisors are Saying About Altius Learning

"In the five years that I've been coached by Altius Learning, my business has experienced over 130% growth,
including a doubling of AUM and an increase of 130% in annuitized assets. Without a doubt, Altius Learning has been the best investment I've made in my 30 years as a financial advisor."

R. W. | Senior Vice President Investments
San Jose, California

"Altius Learning helped me focus on what I do best and identified five ways for me to acquire new clients.
The accountability of having a coach was a great motivator and provided discipline each month to keep me on track. Altius Learning's tactics are tried and true and easy to implement. Since I started working with them, I have consistently been in the top quintile for new households, net new assets and new fee- based business."

M. L. | Vice President - Investments
Reston, Virginia

"The client acquisition strategies taught to me by Altius Learning work.
Over the last three years I have established 24 new relationships and acquired $34 million in new assets. I am more focused, organized and aware than ever in this regard. We are now implementing new strategies to increase these results even further!"

M. T. P. | First Vice President – Wealth Management
Salt Lake City, Utah

"With guidance from Altius Learning, we put together a prospecting system that has resulted in consistent success.

Over the past two years we've averaged over $50MM in new assets annually and recently won an enormous defined contribution plan. Further, we are waiting to hear back from two new prospects who recently completed liquidity events with $16MM and $150MM in net proceeds respectively. Most importantly, we now have a methodology that is proven and repeatable."

T. M. F. | Senior Vice President – Wealth Management
Boulder, Colorado

"Altius Learning helped our team focus on doing the most important things extremely well.

As a result, we have dramatically increased our new account relationships and have in the last four years increased our assets by over 40%. While other training tends to oversimplify and speak philosophically, Altius Learning gives you the real playbook and the specific actions to make it happen."

E. U. | Senior Vice President – Investments
Denver, Colorado

"Altius Learning helped us to identify our vision, our value proposition and how clients can benefit from our specific expertise, unique experience and wisdom.

We've implemented their acquisition strategies and acquired six to nine new affluent clients with approximately $30 million in new assets every year. Our production has had a steady increase of over 15% a year!"

D. E. and N.G. | Senior Vice Presidents – Investments
Denver, Colorado

Elements of the Acquisition Immersion System

Objective
Significantly increase new affluent client acquisition results with a goal of at least 10 new affluent clients and $10 million-plus in one year

Group Size
10 to 12 motivated financial advisors

Experience Level
Minimum three years as an advisor

Methods
Combination of workshop, 1:1 and group coaching sessions focused on execution of seven proven acquisition strategies

Acquisition Workshop
One day workshop that provides the baseline for achievement of acquisition goals

Implementation Coaching
Individual 30-min 1:1 coaching session and 7 one-hour group coaching sessions. Group coaching reinforces acquisition strategies, while providing specific implementation techniques and guidance in overcoming challenges

Accountability
Each advisor sets annual acquisition goals and participates in 12 months of bimonthly reporting, measuring results versus goals

Sustainability
Action steps that local leadership can take to assist their advisors in continuing to implement the acquisition strategies

Participant Cost
$1400 per participating advisor

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GET READY TO GROW

If you're ready to find, engage and acquire new affluent clients and assets, the Acquisition Immersion System is for you. You'll be able to apply the strategies you learn to your business right away and 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 the Acquisition Immersion System, coming soon to your complex.

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1830 Prospector Ave | Suite 1 | Park City, Utah 84060 | info@altiuslearning.com | 888.569.0586

www.altiuslearning.com