ELEVATION TRAINING SERIES

ACHIEVE NEW HEIGHTS

Professional Development for Experienced Financial Advisors

ALTIUS LEARNING

JOIN THE RANKS OF THE ELITE

As a financial advisor, you're working hard every day to find new clients and keep your existing clients happy. You're striving to grow your practice in a way that is personally and professionally rewarding.

Consider these questions:

- **What if someone could show you how to achieve your goals even faster?**
- **What if you could learn specific strategies and tactics that get immediate results?**
- **What if you could move past performance plateaus by applying proven techniques?**
- **What if someone could show you a defined path for building a world-class, million dollar-plus practice?**

Altius Learning, the leader in professional development for financial advisors, can provide you with the answers to these questions and more. Our Elevation Training Series is a three-part offering designed to help you discover your maximum potential and provide a blueprint for creating an immensely successful business.

If you're already an accomplished successful financial advisor but would like to take your practice even higher, Altius Learning can take you there. In the same spirit that top athletes consult with experts to sharpen their skills, our training will help you make quantifiable leaps in performance.

Elevate Your Practice

Altius Learning's training is for motivated, ambitious, experienced financial advisors who want to go to the next level. Ask yourself if these five qualifications apply to you:

1 | **I want to reach my full potential.**

2 | **My mission is 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'll do what it takes to reach my goals.**

There's no such thing as a magic bullet. Our Elevation Series focuses on the execution of proven fundamentals. We'll show you how to put concepts into practice to get the results you seek.

Expert Instructors

The Altius Learning instructors have been highly successful financial advisors and senior executives. 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 and multi-million dollar producers. Their insights come from firsthand experience and personal observation in the field.

Our instructors have distilled what works into best practices. They know how top financial advisors distinguish themselves from others in building thriving practices and are prepared to share those processes with you.

In the same spirit that top athletes consult with experts to sharpen their skills, our training will help you make quantifiable leaps in performance.

BUILD A MILLION DOLLAR PLUS BUSINESS

Our Elevation Series will provide you with proven techniques to:

- **Acquire new high net worth clients**
- **Increase assets under management**
- **Develop loyal clients**
- **Become a highly effective time manager**
- **Boost productivity by working smarter**
- **Discover hidden opportunities**
- **Become proactive in developing your business**
- **Move past performance plateaus**
- **Increase your self-confidence**
- **Build, manage and motivate your team**
- **Exceed your own expectations for success**

You'll get practical, real-world advice that you can use to build your million-dollar practice, create greater value for your clients and enjoy a more satisfying, prosperous career.

Take Action to Be Your Best

The most effective training comes in the form of actionable steps, specific strategies you can apply to your business right away. Altius Learning takes a tactical approach to training, translating concepts into processes to have a long-term impact on growth.

In our Elevation Series, you won't hear any textbook theories. Instead, you'll learn critical strategies and tactics that create a culture of success, from prospecting to developing loyal clients. Our methods are extremely pragmatic. Participate in our training and you'll get all the tools, including scripts and detailed how-to instructions, to implement what you learn.

3 Compelling Sessions

Our Elevation Series consists of three information-packed, two-hour sessions. **Each session covers different material with no overlap, yet all have a common thread: how to gather more client assets.** They're spaced one to two months apart to allow you to progressively implement techniques learned.

The information we provide comes from top financial advisors in the industry. It was obtained through interviews, observations and shared best practices and then boiled down into easy-to-implement tactical steps. The sessions are:

SESSION ONE Business Development Training

The right activities lead to business growth. Learn proven acquisition strategies used by top producers including how to:

- **Create the right mindset for success**
- **Combine the right mental approach with winning tactics**
- **Build a referral system from personal acquaintances and existing clients**
- **Establish a professional referral network with accountants and attorneys**
- **Employ a 4-step process to leverage a successful niche-marketing plan**
- **Implement a non-profit leadership strategy to gain access to affluent individuals**
- **Apply proven strategies for transitioning personal relationships into clients**
- **Employ a 4-step process to acquire your current clients' assets held away**
- **Initiate an event-marketing process as a lead-generating activity**
- **Construct a pipeline of 50 quality prospects to generate 10 new clients annually**

SESSION TWO Business Management Training

This session will help you gain insights into building a highly productive, process-based business like those operated by the most successful advisors in the industry. With a focus on "how to" rather than the theory of effective practice management, you'll learn to:

- **Develop a business plan to reach your short- and long-term goals**
- **Learn the 4 levers needed to reach your full potential**
- **Harness the power of setting and attaining goals**

- Employ the biggest growth lever: a client segmentation strategy
- Become a highly effective time manager
- Refine your service model to turn your clients into raving fans
- Transform your practice from a reactive to a proactive model
- Increase your Return on Assets
- Bring scale to your practice through processes
- Develop a world-class team
- Determine how to apply retained earnings to grow your business

SESSION THREE Wealth Management Training

In this training session, we outline the Five Cornerstones of a world-class wealth management practice. These are the principles used by top advisors. We also provide specific standards and benchmarks that allow you to quantify the value you deliver to your clients and cultivate their loyalty. You'll learn to:

- Examine the 3 components of trust that form the basis of solid client-advisor relationships
- Use a deep discovery process to determine your client's true objectives
- Increase your sphere of influence in the client's financial decision-making process and grow your assets under management as a result
- Employ 5 tools for implementing a goals-based approach to wealth management
- Identify the 7 characteristics common to top advisors' investment process
- Conduct client reviews that gather important feedback
- Find meaningful ways to demonstrate a commitment to your client's success
- Master the Five Cornerstones. Use them to reinforce your unique value proposition
- Develop a client-centered practice that fosters loyalty
- Position your business for unlimited, long-term success

We'll show you the path to building a million dollar plus practice by removing the guesswork and demonstrating what works.

"Last night's training session was a success! We had 31 advisors, the complex manager and three of his branch managers attend the Altius Learning event. **The instructor was great. I've never seen advisors take notes so furiously!**"

– Jean P-H. | A major asset management firm

"Thank you for taking the resources and time to bring in the speakers from Altius Learning. For someone like me working to grow my practice the right way, their message and enthusiasm were well timed. **When you ask what you can do to help us, this training is a perfect example.**"

– Bradley P. | Financial Advisor

"One of our advisors just told me he fired his coach after attending your Business Development session because **he got more client and asset acquisition ideas in one two-hour session with Altius Learning than he had in five months with his coach.** And he didn't have to shell out $5,000 to get it!"

– David L. | Financial Advisor

HERE'S WHAT PARTICIPANTS ARE SAYING ABOUT OUR ELEVATION SERIES

"Thank you again for a meaningful training session yesterday. We all appreciated the enthusiastic presentation of relevant content to help our financial advisors build their practices. **The 40 or so FAs we had in the room came from every branch in the city and rated your meeting 5 out of 5. Your organization continues to provide the absolute best training that our complex has experienced.**"

– Matt K. | Branch Manager

"**The feedback we got on the Elevation Series is very positive.** I thought that it was perfect in content and delivery. Thank you!"

– Greg H. | Financial Advisor

"We had a full house yesterday for your session with mostly large producers (up to $3 million). **The feedback was excellent. Thank you for a great job!**"

– Greg A. | Branch Manager

"**This was one of the best marketing meetings I have been to at Morgan Stanley or Merrill Lynch in 31 years.** Thanks for having Altius Learning come into our office."

– Jim F. | Financial Advisor

"Thank you for the great sessions. **I have had many positive comments from my $3.5 million FA to my new advisors. You hit a HOME RUN!**"

– Larry K. | Branch Manager

REACH THE SUMMIT

If you're ready to take charge of your professional development and accelerate your ascent as a world-class Advisor, you owe it to yourself to attend the Elevation Series by Altius Learning.

Speak with your manager for upcoming training dates.

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