ALTIUS LEARNING IMPACT DAY

Focused Training for the Experienced Financial Advisor

Grow Your Practice

As a successful financial advisor, you know what it takes to establish your business. You're confident in your methods and you've already achieved some of your goals. **But now you're ready to push through to the next level, the one that puts you on the path to building a world-class, million dollar-plus practice.**

Altius Learning, the leader in professional development for financial advisors, invites you to address the biggest challenges to the growth of your practice. Our Impact Day training is a 75- to 90-minute session that **builds on the content of our Highly Acclaimed Elevation Training Series.** It shows you how to put the concepts into practice.

> The Altius Learning Impact Day is an opportunity to get personalized instruction in a small group setting on one or two specific issues to help you achieve your maximum potential.
> We help you prioritize your growth strategy.

Elevate Your Game

The Altius Learning Impact Day is not for newcomers to the field. It's advanced training for motivated, ambitious, experienced financial advisors and their teams. In the same spirit that top athletes consult with experts to sharpen their skills, Impact Day training will help you make quantifiable leaps in performance that translate into real results.

Guidance from Expert Instructors

When you're seeking answers on how to fine-tune your practice, you want expert advice and specific steps, not theories or academic studies. The Altius Learning instructors have been highly successful financial advisors and industry leaders. They each have 25-30 years of experience at top companies in the financial services industry.

We have hired, trained and mentored thousands of financial advisors, many of whom are million dollar-plus producers. The Impact Day gives you an opportunity to put our winning strategies to work for you.

Advisor Proven, Altius Delivered®

The Altius Learning instructors have distilled what works into best practices. Their ideas were obtained through interviews and observations of top financial advisors, then refined into easy-to-implement tactical steps.

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

You Choose the Focus

Every activity that financial advisors must perform in order to reach their full potential falls into one of three categories:

1 | **Acquiring new clients and deepening relationships with existing clients**

2 | **Managing your practice in an efficient manner**

3 | **Delivering world-class wealth management services**

Altius Learning invites you to go deep into one of these three critical components of success. First, choose the following session that interests you most. Next, select up to three topics from that session as the focus for your Altius Learning Impact Day.

Session 1 | Business Development Training

The right activities lead to business growth. Below are proven acquisition strategies used by top advisors. Your Impact Day training can encompass up to three of these topics:

- **Learn to develop a top advisor's mindset for the acquisition of new affluent clients**
- **Build a proactive referral system from personal acquaintances and existing clients**
- **Establish a professional referral network with CPAs 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 and key centers of influence**
- **Use a 4-step process to acquire your current clients' assets held away**
- **Initiate an event-marketing process as a client acquisition strategy**
- **Discover how constructing a pipeline of 50 quality prospects will generate 10 new affluent clients annually**

Session 2 | Business Management Training

Gain insights into building a highly productive, process-based business like those operated by the most successful advisors in the industry. Choose up to three of the practice management topics below:

- **Become a more effective time manager**
- **Develop and deliver a world-class service model**
- **Create a strategic business plan**
- **Explore three proven tactics to increase business efficiency**
- **Learn techniques to construct a process-based practice**
- **Explore the five elements of a highly functioning team**
- **Discover segmentation strategies for delivering a million-dollar-plus practice**
- **Identify ways to invest in your practice for growth**

Session 3 | Wealth Management Training

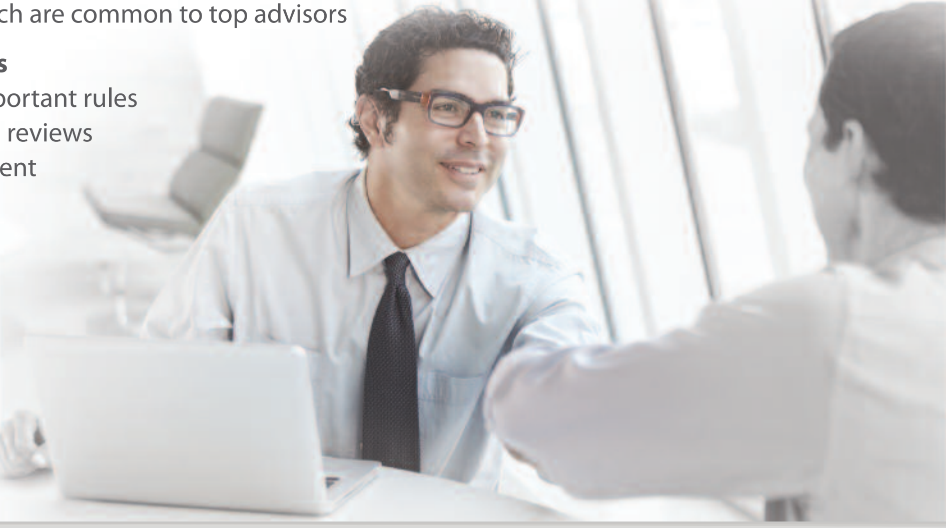
A world-class wealth management practice has four cornerstones that rely on the foundation of deep client trust. We will compare your current approach to that of top advisors, give you tools to benchmark your own efforts, and show you how to incorporate this work into your own value proposition. In addition to examining the 3 components of trust, your training includes your choice of up to two of the following cornerstone topics:

1 | 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

2 | Understand Goals-Based Wealth Management
Adopt a more goals-based approach to the advice you provide your clients

3 | Identify the critical elements of top advisors' investment process
Review the seven characteristics which are common to top advisors

4 | Examine your client review process
Learn why this is one of the most important rules of engagement and how meaningful reviews will showcase your sincere commitment to the client's success



Here's How It Works

The Altius Learning Impact Day is a four step process:

Step 1 | Choose topics and complete the Altius diagnostic tool.
Approximately 30 days in advance, identify the primary category and sub-topics that will be the focus of your upcoming Altius Learning Impact Day. Then complete the detailed discovery profile that will help us evaluate your practice and zero in on your strengths and opportunities.

Step 2 | Discuss profile findings with an Altius instructor.
Prior to your Impact Day training, you'll discuss the results of your discovery profile and potential solutions in a 20-minute phone conversation with an Altius practice management expert. You'll also be given pre-work to complete that will help you maximize the benefits of your upcoming Impact Day session.

Step 3 | Attend your Altius Learning Impact Day session.
We meet at your office for a 75-90 minute information-packed, interactive session on the topics you chose earlier.

Step 4 | Use the written recommendations to apply what you've learned.
Within one week following your Impact Day session, Altius Learning will provide you with a written recap of your training. It will include practical ideas for executing the next steps we discussed.

Become an Impact Player

The Altius Learning Impact Day will help improve your client-centered practice, and position you for greater long-term success in the financial services industry.

If you're ready to take charge of your professional development and become one of the top financial advisors in your field, you owe it to yourself to participate in an Altius Learning Impact Day. Speak with your manager to schedule your training date.