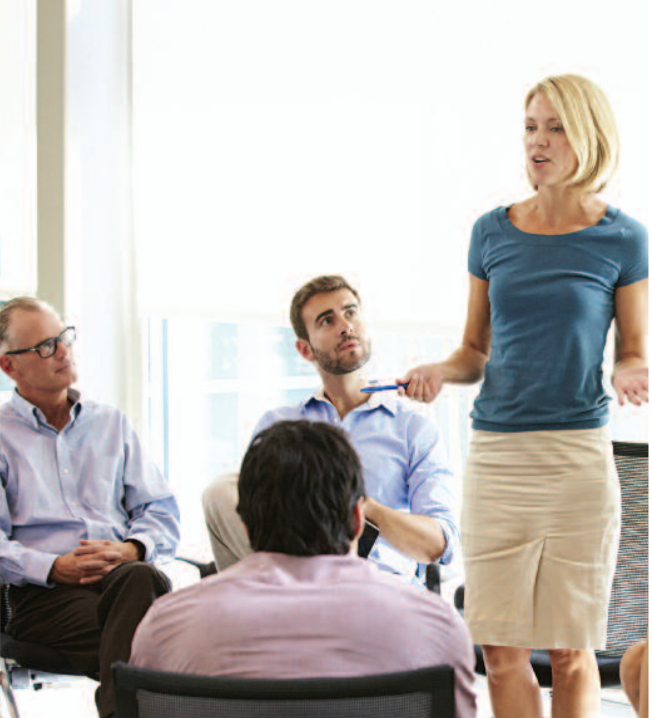
SMALL GROUP COACHING

Results-Based Training for Motivated Financial Advisors

ALTIUS LEARNING



ABOUT THE PROGRAM

Who It's For

Altius Learning offers small group 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.

Qualified Coaches

All Altius Learning coaches are seasoned professionals with 25-30 years of experience at top financial companies serving as elite advisors and senior executives. They have proven expertise teaching the **13 Success Principles** and motivating financial advisors to achieve their highest goals.

Results-Oriented Focus

The Altius Learning group coaching program is a tactical-based model. We focus on the execution of proven fundamentals to get measurable results. Our strategies are based on the best practices of million-dollar advisors.

Don't spend time developing your own systems and creating your own materials.

Altius Learning can shorten your path to success by providing you with ready-to-implement tactics already proven to work.

Tools and Training

In every session you'll get straightforward advice and targeted instruction on using well-honed techniques. You'll receive everything you need to implement what you learn including:

- **Step-by-step instructions for growing your own million-dollar-plus advisor business**
- **4 scripts for converting affluent relationships into satisfied clients**
- **5 strategies to identify and approach referral sources**
- **Techniques for better time management**
- **Processes to improve efficiency, maximize capacity and build scale**
- **Methods for optimizing team interaction and performance**
- **Building Professional Referral Networks**
- **Ways to overcome implementation challenges**
- **Guidance in creating your own unique value proposition**

Peer-to-Peer Sharing

The best advisors learn from others. As part of a small coaching group, you'll have the benefit of interacting with other advisors, hearing about their challenges and incorporating their successful strategies into your practice.

Accountability Ensures Action

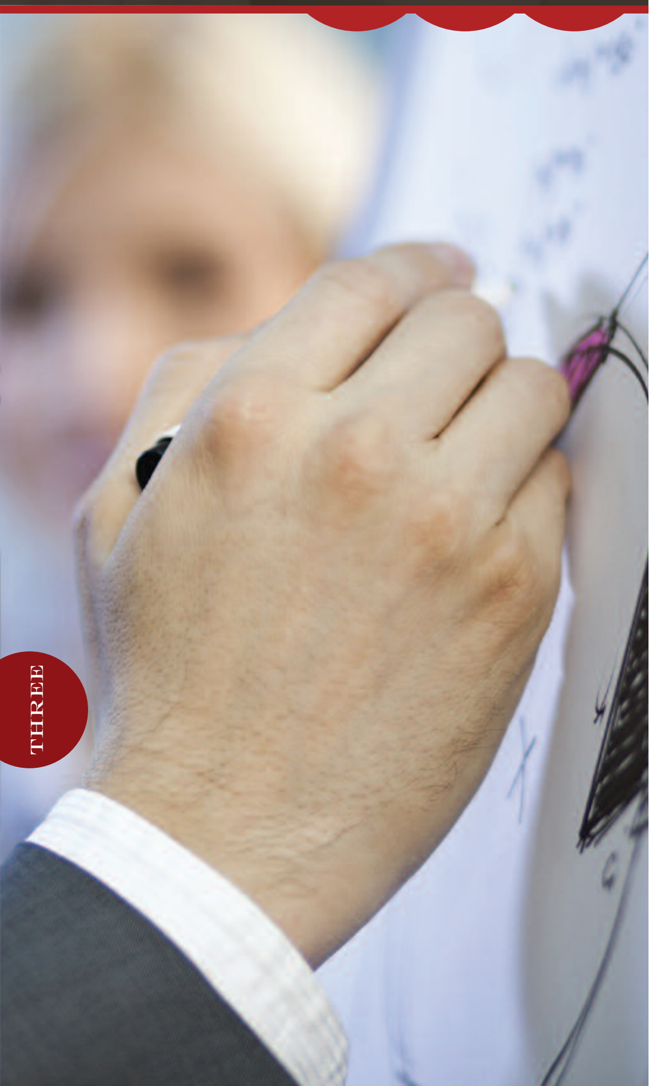
Altius small group coaching is not just about learning; it's about doing. You'll be held accountable by your coach and by your peers for implementing the tactics learned. Each meeting will include specific action items, all designed to help you make significant positive changes in your practice.

Be Extraordinary

No investment is more important than the one you make in yourself. The right personalized training can be the difference between an average financial advisor's career and an exceptional, million dollar practice. Altius Learning will guide you to grow your business, create value for your clients and enjoy a more rewarding career.

No investment is more important than the one you make in yourself.

FREQUENTLY ASKED QUESTIONS



1. What is Altius Group Coaching?

It's a unique program designed to help motivated financial advisors and their teams achieve higher levels of successs. It is based on best practices used by the nation's top advisors.

2. How many people are in a group?

The ideal group size is 6 to 7 financial advisors.

3. Who are the Altius Learning coaches?

They are seasoned professionals who bring to the table 25-30 years of experience at top financial companies serving as elite advisors and senior executives. Additionally, they have proven expertise teaching the **13 Success Principles**. Their methods are prescriptive, tactical and results-oriented.

4. What are the main objectives of coaching?

You'll learn how to grow your practice to the million-dollar level and beyond, create greater value for your clients and enjoy a more rewarding and prosperous career.

5. What is the length of the coaching contract?

Coaching contracts are for one year, however, many participants continue for additional years. They recognize the strides they've made and realize that with the right coach, they can grow their practice even more.

6. How often will we meet?

The first session will be an in-person group meeting with the coach. After that initial meeting, the group will have a conference call once a month for the balance of the one year engagement. The calls last approximately 90 minutes. Additionally, your Coach is available for calls and emails in between the monthly group calls.

7. What is the role of the coach?

The coach serves as a mentor and business strategist to guide you on improving performance. They have a specific agenda for each meeting that includes analyzing the prior month's accomplishments, a discussion of success principles and finally, action steps for you to take during the next month.

8. Couldn't I read the course materials and get the same results as someone who's coached?

Advisors can learn the material on their own, but putting it into practice isn't easy. Small group coaching focuses on implementing the techniques learned. It's all about taking action and getting measurable results. The coach holds you accountable for completing action steps, achieving goals, and guides you to maximize your successes. Additionally, as a member of a group, you'll benefit from peer-to-peer sharing, interaction and role playing.

9. Can you give a few examples of topics we'll cover?

Here are some examples:

- **A proven 4-step process for bringing in client assets held away**
- **Winning tactics for establishing a prospect pipeline**
- **A transition strategy for converting affluent personal relationships into satisfied clients**
- **Methods used by million-dollar advisors to create a successful referral process**
- **How to design your Unique Value Proposition (UVP), key to client acquisition**
- **Crafting your five-year business plan to reach your goals**

10. I've already achieved a fair amount of success. Why do I need coaching?

Our coaching will help you take your business to the next level. We'll show you the path to building a million dollar practice based on success principles used by the top financial advisors in the country. We remove the guesswork and tell you what works. We'll help you accelerate your success, bridging the gap between where you are now and where you'd like to be.

11. How do I know if I'm a good candidate for coaching?

If you have high professional standards, are open to new ideas, and are motivated to doing what it takes to reach your goals, you're the type of financial advisor who will greatly benefit from coaching.

12. What if I'd rather do one-on-one coaching as opposed to participating in a group?

We do offer one-on-one coaching and have worked with many advisors in that capacity. Of course, the cost for individualized coaching is higher. We'd be glad to discuss that option with you.

13. How much does group coaching cost?

The annual engagement fee is $4,000/year per Advisor. It is billed quarterly.

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

Top 10 Reasons to Do Small Group Coaching

In small group coaching, you'll learn how to grow your practice, create greater value for your clients and enjoy a more rewarding and prosperous career. Specifically, you can expect to achieve the following goals.

10. Acquire new high net worth clients

9. Grow assets under management

8. Deepen loyalty and engagement of existing clients

7. Increase productivity and stimulate motivation

6. Improve work-life balance

5. Gain control of your practice, become proactive vs. reactive

4. Move past performance plateaus

3. Benefit from peer-to-peer shared experiences

2. Bridge the gap between where you are now and where you'd like to be.

The #1 reason to do small group coaching:

1. Build and manage a world-class practice.

According to Investment News:

"Most advisors are used to being their own boss, but top-performing advisors know they can benefit by having an impartial and experienced confidant who can hold them accountable while teaching them to think and act differently.

The right coach can help an advisor work smarter instead of harder, enhance client relationships, attract and retain the right staff, and ultimately expand their business. Not convinced coaching will pay off? Boston research firm Cerulli Associates, Inc. recently completed a study that quantifies the value of using a coach. Within the group of advisors they studied, those who used coaches generated average annual revenues of 28% more than those who did not, even though both groups had a comparable level of assets under management and were studied under identical time frames."

InvestmentNews

Here's What Our Coaching Clients Are Saying

"I just wanted to let you know we hit our goal. Thank you — as you must know, you are a very big part of this achievement. We appreciate your huge support. Thank you for everything." — E.U. and B.P.

"I just wanted to boast to the teacher. I met a plastic surgeon at a black-tie event and used the lines you and I spoke about. He emailed me back the following with a 'yes' and 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.

"I had a big win I wanted to share with you regarding a 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 mentioned he has started talking to the firm's Institutional Team about taking his company public in 2013. He also is willing to refer other individuals at his company for me to meet to help with their finances. Thank you!!!" — F.E.

"We just had a great team meeting to discuss our final Business Plan. **We want to compliment you on what a superb job you have done** on capturing our strengths, weaknesses, and what needs to be done to make the necessary changes in order to reach our goals. Thank you so much!" — N.G.

"Our 2–hour Professional Alliance CEO Event was a total success. We had 50 guests -- all business owners, CEOs and other C-Suite Executives and entrepreneurs. One attendee has a net worth well over $1 billion. We now have 4 Strategic Partners and have added 2 new members. We agree with you that referrals will naturally come as we communicate what we do by providing specific examples that they can understand. You have changed my life and for this I will always be grateful." — N.G.

PROGRAM OVERVIEW

Month 1
Program Goals and Logistics, Mindset, Business Plan Development, Goal Setting

Month 2
Clients Assets Held Away, Client Reviews, Time Management

Month 3
Client Referrals and Prospect Pipeline

Month 4
Client Loyalty, Building Trust and Segmentation

Month 5
Event Marketing and Right Place, Right People

Month 6
Developing a Value Proposition and Marketing Materials

Month 7
Professional Referral Network and Niche Marketing

Month 8
Discovery and Expansion of Wallet Share

Month 9
Goals-based Planning, Investment Process and Proposals

Month 10
Teams Best Practices, Budgeting and Process-based Practice

Month 11
Non-Profit Leadership, Client Advisory Board and Professional Development

Month 12
Social Media Marketing and Pulling It All Together

Invest in Your Most Valuable Asset – YOU!

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. Elite athletes need professional coaching. 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. No cost. No obligation. No hard sell. Just the facts about how coaching can change the trajectory of your career.

ALTIUS LEARNING

Altius Learning
888-569-0586
info@AltiusLearning.com
www.AltiusLearning.com