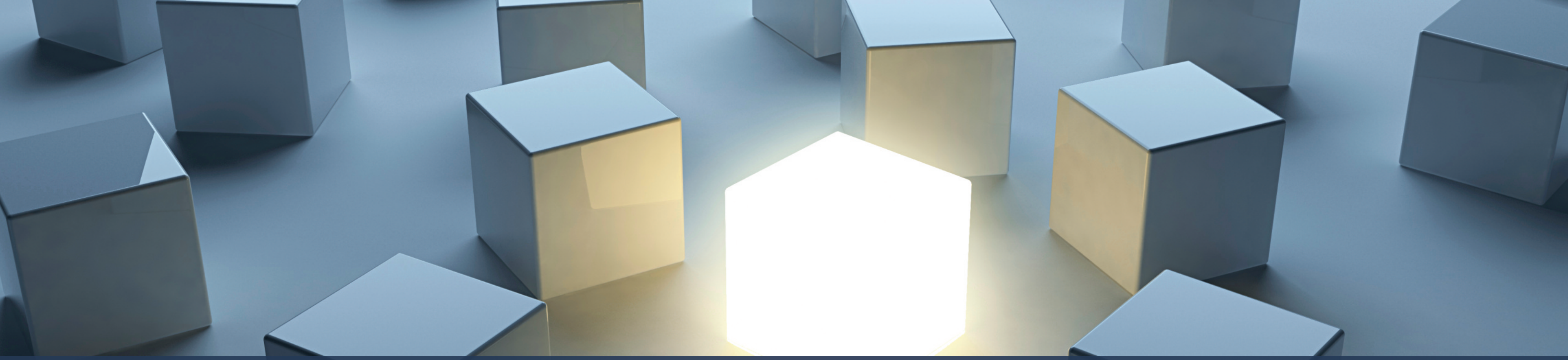

PRACTICE MANAGEMENT IMMERSION

for Experienced Financial Advisors

Increase Productivity and the Efficiency of Your Practice

You've invested countless hours building your financial advisory practice. You've cultivated the right clients and assembled a quality team to service them.

But managing a busy financial advisory practice isn't easy. Your days are often spent putting out fires. You're reacting to situations instead of being proactive. And handling administrative issues is a constant challenge.

Your practice is evolving, and if you've never received practice management training, you're likely making it up as you go along. Fortunately, there is a better way, one that eliminates guesswork and accelerates your success.

Practice Management Immersion will teach you proven best practices that will maximize your efficiency and position your business for long-term growth.

Six Proven Practice Management Tactics

The most successful financial advisors apply six fundamental strategies to maximize their productivity. Practice Management Immersion will teach you these tactics and help you apply them to your business for benefits you'll see almost immediately. They include:

1 | **Business Planning** Develop a detailed plan for your future. Set goals and determine the steps to reach them.

2 | **Segmentation** Learn and understand the biggest productivity lever by organizing your practice appropriately.

3 | **Business Efficiency** Expand your client relationships by improved focus and increasing your best clients' wallet share.

4 | **Service Model** Deliver superior service and cultivate unwavering loyalty from your clients.

5 | **Team Best Practices** Lead your team to function at its highest level.

6 | **Time Management** Eliminate distractions, delegate more and focus on activities that affect your bottom line.

Why Practice Management Immersion Is Different

You can read about different management techniques. But applying them to your own unique situations can be difficult. Practice Management Immersion bridges the gap between knowing and doing. Our proven formula for success includes:

Training
Learn how to put proven productivity strategies into your daily activities.

Coaching
Overcome the inevitable challenges of implementation.

Accountability
Set challenging but achievable goals and be held accountable for them.

Motivation
Stay focused with encouragement from an experienced coach.

Sustainability
Continue to apply what you've learned long after you've completed the training.

Learning and implementing new processes is challenging. Practice Management Immersion helps you work toward making those skills become second nature.

Expert Instructors

Practice Management Immersion instructors have been highly successful financial advisors and experienced managers.

They are talented professionals, each with 25-30-plus years of experience at top companies in the financial services industry. They have hired, trained and mentored hundreds of financial advisors, many of whom have managed multi-million dollar practices. Their insights come from first-hand experience and personal observation in the field.

They know how top financial advisors built their businesses and will share those best practices with you.

Here's What Financial Advisors are Saying About Altius Learning

"I've been in business for 15 years and this was the best training I have ever received.
I've already found ways to implement some of the strategies and ideas you gave and can see how they will improve my practice."

D. S. | Senior Financial Advisor
Kansas City, Kansas

"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. 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

"I came away rejuvenated with fresh ideas."

J. F. | Senior Financial Advisor
Tyler, Texas

"The material was very practical and really resonated with my crew."

R. D. | First Vice President/Complex Manager
Pittsburgh, Pennsylvania

Elements of Practice Management Immersion

Objective
Increase the productivity of your practice; position your business for dynamic growth through enhanced efficiency and creating scale.

Group Size
10 to 12 motivated financial advisors

Experience Level
Minimum three years as an advisor

Methods
Combination of workshop and group coaching sessions focused on execution of six proven practice management strategies

Practice Management Workshop
One day workshop that presents strategies and best practices for achieving maximum productivity

Implementation Coaching
Six 75-minute biweekly coaching sessions beginning two weeks after the Practice Management Workshop. Group coaching reinforces management strategies, while providing specific implementation techniques and guidance in overcoming challenges.

Participant Cost
$1200 per participating advisor split between the firm and the advisor

ALTIUS LEARNING

TRANSLATE POTENTIAL INTO UNLIMITED SUCCESS

If you're ready to make significant improvements in efficiency and productivity for your business, Practice Management Immersion is for you. You'll be able to apply the strategies you learn to your business right away and position your practice for long-term growth and prosperity.

Realize your unlimited potential. Speak with your manager for dates and specifics on participating in a Practice Management Immersion session.

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