

Financial Planning Practice

Practice Accelerator Program Guide

For financial planning professionals

think²
perform[®]
MAKING THE IDEAL REAL[®]

boost your capacity

PRACTICE ACCELERATOR

RAMP UP YOUR PRACTICE.

Improve the growth trajectory and efficiency of your financial planning practice with Practice Accelerator coaching and consulting. Working with an experienced coach, you'll learn to think and act more strategically, fueling decisions and execution that drive consistent, profitable, and sustainable growth. Practice Accelerator boosts your capacity to create your ideal financial planning practice.

THINK2PERFORM'S PRACTICE ACCELERATOR HELPS YOU:

- > Adopt a CEO mindset that complements your technical experience
- > Deliver an exceptional and referable client experience
- > Build and lead a productive team
- > Drive profitable growth and efficiency through advice-based relationships

THE FOUR-STAGE ACCELERATOR PROGRAM (OVER FOUR MONTHS)

Strengthening Practice Foundation	Attracting More New Clients	Deepening Client Relationships	Boosting Operational Performance
<i>Fine-tuning the engine</i>	<i>Choosing the most successful path</i>	<i>Shifting into high gear</i>	<i>Turbo-charging efficiencies and effectiveness</i>
<ul style="list-style-type: none">> Upgrade business and marketing plan> Develop team and leadership dynamics> Technology evaluation> Fee setting> M&A assessment and implementation	<ul style="list-style-type: none">> Marketing planning and execution> Refining value proposition> Defining ideal prospects> Focusing on what gets you new clients	<ul style="list-style-type: none">> Client segmentation> Client service model> Client experience> Product solutions	<ul style="list-style-type: none">> Staff and team leadership and development> Practice management> Protecting your practice> Succession planning> Staff compensation> Paperless workflows> Practice efficiencies

PROVEN RESULTS

Over the past six years, more than 500 advisors leveraged the advantage of Practice Accelerator. Participating advisors have consistently seen higher year-over-year growth compared to control group averages. Practice Accelerator graduates have experienced measurable increases in client satisfaction, new clients acquired, increased asset flow, implementation of insurance opportunities, and, ultimately GDC and revenue.

READY TO ACCELERATE YOUR PRACTICE?

- > Are you motivated to drive short- and long-term growth?
- > Have you experienced a catalyst prompting change, such as hiring a junior associate, remodeling, moving, merger, acquisition or other event?
- > Are you concerned about flat or negative asset flow?

EXPECTATIONS:

Prior to the program, you will need to complete several assessments and participate in a half-day, on-site assessment at your office with your coach. Once you start, you can expect weekly 45 minute one-to-ones by phone with your coach. You can also expect 1-2 hours of homework per week for you and/or your team.

Practice Accelerator is the most impactful program I've completed in my 27 years as a Financial Advisor. The program helped me evaluate my practice from several different angles. I found myself more thoughtful and dedicated to consistently growing my practice through smart and strategic decision making along with execution around efficiencies. The end result was a 20% plus increase in GDC in the 1st year and a clear understanding of the direction and effort I needed to execute to improve my practice in all areas. I truly appreciated the individual coaching during the program as it was personal to my practice and assisted me implementing the opportunities uncovered in the program.

– Charlene D. Clayton, ChFC®

ABOUT THINK2PERFORM

For more than a decade, think2perform's Professional Coaching, Leadership Consulting, and Business Development Services have improved the decision-making skills and performance of individuals and organizations. We serve multiple industries including Financial Services, Healthcare, Non-Profit and Education, and our clients range from Fortune 100 firms and major league sports franchises to med-tech start-up and high-profile business schools.

Practice Accelerator



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