FOCUSED ON THE FUTURE OF YOUR BUSINESS

The cornerstone of our business is helping advisors succeed. That is why we created a comprehensive practice management platform offering actionable insights and consultative solutions.

Our programs are grounded in proprietary research and leverage the latest thinking and trends from both industry and academia. We provide a diverse range of capabilities that address questions on a variety of topics:

• Discussion on forces shaping the investment landscape
• Best practices to drive results and optimize your business
• Conversation starters to guide and engage with clients
• Continuing education to hone techniques and accentuate your value

Business Development
Define Your Value Proposition and Optimize Your Business Plan

The Price of Financial Advice
• Fees and value: Addressing both sides of the value equation
• Appreciating the true value of financial advice

The Advisor Retirement Wave
• Succession strategies for a profitable transition
• Opportunities for client retention and prospecting

Client Engagement
The Ideal Balance Between the Quality of Relationships and Business Growth

Closing the Gender Gap of Advice
• Understanding the financial experiences and behaviors of female investors
• Busting through myths surrounding women and investing

Investor Behavior
• Making performance personal: It’s not about returns, it’s about results
• Tying goals-based financial planning to asset allocation and investment selection

Multigenerational Wealth Management
Dynamics of Wealth Across Generations and Asset Continuity in Your Practice

A Roadmap for a New Landscape
• How Baby Boomers, Generation X and Millennials are reshaping the agenda
• Reconciling client inertia: Strategies to shift the wealth transfer mindset

Financial Decision Making and the Aging Brain
• When clients lose mental acuity
• Proactively protect your financial assets at retirement

Developing Financial Knowledge
• The importance of investor comprehension
• Effective stewardship of a family’s wealth legacy: Raising financial savvy children

Strategic Philanthropy
• Uniting behind a mission and a shared set of values
• Effective and collaborative planning: Gift structures and tax regulation

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