

# FACULTY MENTOR PROGRAM™

EMPOWERING HIGH PERFORMING ADVISORS



SCOTT SPARKS



BEN BESHEAR



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## This monthly mentoring program moderated by Scott Sparks, Ben Beshear and Ray Sclafani

promises to provide valuable insights and knowledge from industry leaders, helping you enhance your skills and excel your advisory practice. Each has moderated hundreds of learning sessions and are now bringing the best of all of our content to one place. This is perfect for the entrepreneurial advisor who has built or aspires to build a multi-million plus practice.

### SESSION 23 Proven Practices for Establishing Partnerships & Owner Compensation

*Tuesday, January 6, 2026*

Moderator: Ben Beshear and Ray Sclafani

- Define fair owner compensation models
- Structure clear partnership agreements
- Incentivize growth with performance-based compensation
- Plan smooth partner buy-ins and buy-outs
- Benchmark compensation to attract talent

### SESSION 24 Mastering Client Handoffs: Ensuring Next-Generation Advisor and Client Success

*Tuesday, February 3, 2026*

Moderator: Scott Sparks and Ray Sclafani

- Effectively introduce next-gen advisors
- Apply the chair 2 advisor model
- Know when to step away
- Monitor progress with key metrics
- Set realistic expectations for next-generation advisors

### SESSION 25 From Data to Action: Establishing KPIs for Firm Efficiency & Growth

*Tuesday, March 3, 2026*

Moderator: Scott Sparks, Ben Beshear and Ray Sclafani

- Identify KPIs aligned with your vision
- Balance financial and non-financial KPIs
- Foster accountability with clear metrics
- Use data for strategic adjustment

### SESSION 26 Mastering Time Management: How Many Hats Can You Really Wear?

*Tuesday, April 7, 2026*

Moderator: Scott Sparks and Ben Beshear

- Work on the business vs. in the business
- Maximize client-facing time
- Explore the surge model for productivity
- Learn productivity tips from leaders
- Apply insights from 'Buy Back Your Time'
- Plan for strategic changes

### SESSION 27 Team Compensation that Attracts, Motivates & Retains Top Talent

*Tuesday, May 5, 2026*

Moderator: Scott Sparks and Ben Beshear

Guest: Megan Stevens, Senior Director, Practice Management

- Design performance-driven compensation
- Offer equity and profit-sharing models
- Provide competitive, meaningful benefits
- Reward team collaboration
- Adapt strategies for next-gen talent

### SESSION 28 The Equity Blueprint: Successfully Structuring & Incentivizing Your Practice

*Tuesday, June 2, 2026*

Moderator: Scott Sparks and Ray Sclafani

- Develop an effective equity model
- Navigate equity buy-in versus performance-based ownership
- Align equity with long-term growth
- Create a succession-focused equity plan
- Avoid common equity & succession planning pitfalls

### SESSION 29 Scaling Leadership: When Your Firm Outgrows You

*Tuesday, July 7, 2026*

Moderator: Scott Sparks and Ben Beshear

- Recognizing leadership bottlenecks
- Founder vs enterprise leadership mindset
- Building a true leadership team
- Delegation at scale



## SESSION 30 Designing the Next Generation Firm

Tuesday, August 4, 2026

Moderator: Scott Sparks and Ben Beshear

- Multi-led advisor models
- Creating clear career tracks
- Developing next-gen owners
- Avoiding generational culture gaps

## SESSION 31 Building an Enduring Firm Culture

Tuesday, September 1, 2026

Moderator: Scott Sparks and Ben Beshear

- Culture by design vs default
- Reinforcing values through hiring & comp
- Culture as a retention strategy
- Leading through growth and change

## SESSION 32 From Tools to Traction: Turning Technology & AI into Real Firm Performance

Tuesday, October 6, 2026

Moderator: Ray Sclafani and Ben Beshear

Guest: Vasco Bridges, Vice President, Field Experience

- Emerging tools and platforms shaping the future of advisory firms
- Turning AI from experimentation into consistent, firm-wide execution
- Integrating technology into workflows that scale
- Where technology is creating measurable impact today

## SESSION 33 Client Segmentation at Scale

Tuesday, November 3, 2026

Moderator: Scott Sparks and Ben Beshear

- Redesigning service models for growth
- Ideal client definitions
- Tiered service models
- Protecting advisor time

## SESSION 34 Strategic Growth Decisions: When to Acquire, Merge or Stay Independent

Tuesday, December 1, 2026

Moderator: Ray Sclafani, Scott Sparks and Ben Beshear

- When M&A makes sense
- Cultural integration risk
- Financing growth
- Evaluating long-term independence

## PROGRAM DETAILS

The Faculty Mentor Program is an ongoing, continuous learning experience designed to evolve with your firm.

**Duration:** 12 Months

**Frequency:** 1 per month

**Time/Date:** 10 a.m.- 12 p.m. ET on first Tuesday of each month. Sessions will be recorded, and access will be available after each session.

**Duration:** 2 hours per month

**Platform:** Zoom (Invitations available at sign-up)

**Cost:** \$1,000/month for Ensembles

\$800/month for Solo Advisors

Cost includes unlimited team members

## HOW TO ENROLL

1. Fill out the form on [www.clientwise.com/mentor](http://www.clientwise.com/mentor)
2. You will receive an email that includes next steps which will prompt you to log-in or sign up to the ClientWise eXchange™ community
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