

BUSINESS
BUILDERS
ACADEMY™

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Name:

Date:

About ClientWise LLC



ClientWise is the premier business and executive coaching firm working exclusively with financial professionals. We specialize in helping clients optimize growth and maximize revenue by engaging as a knowledgeable partner in accomplishing specific and significant business results. Our full-service coaching program empowers financial advisors, wholesalers, managers and executives to enhance performance through customized, action-oriented solutions based on each client's specific vision and situation.

Our certified coaches are members of the International Coaching Federation (ICF). They adhere to ICF's strict code of ethics and have the experience and insight to work with you on the unique challenges and opportunities you face each day.

Drawing from an in-depth knowledge of the financial industry, ClientWise's mission is to professionally develop industry leaders and consistently raise the bar for industry service, commitment and integrity. Simply put, our singular focus is to help you get **clear**, get **focused**, and get **results**.

Get **Clear**. Get **Focused**. Get **Results**.™

CLIENTWISE IOQ WORKSHEET

ISSUES WORKSHEET

ISSUES WORKSHEET

OPPORTUNITIES WORKSHEET

OPPORTUNITIES WORKSHEET

QUESTIONS WORKSHEET

QUESTIONS WORKSHEET

Notes:

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 clientwise.com


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ClientWise Coaching and Consulting Services

- ▶ Executive Coaching
- ▶ Research Services
- ▶ Curriculum Design and Program Development
- ▶ Presentation Delivery and Workshop Facilitation
- ▶ Professional Development and Coaching Services

ClientWise Financial Services Clients

- ▶ Industry Executives
- ▶ Wealth Advisors
- ▶ Financial Advisors
- ▶ Broker Dealer & Registered Investment Advisors
- ▶ Asset-Management and Insurance Companies

