CLIENTWISE COACHING SERVICES FOR TEAMS & ENSEMBLES

Prepared for Edward Jones

clientwise™

GET CLEAR. GET FOCUSED. GET RESULTS.™

FINANCIAL ADVISING
IS A NOBLE PROFESSION

STRATEGIC PARTNERSHIP

BUSINESS BUILDERS ACADEMY™

Powered by ClientWise for Edward Jones

A LEADERSHIP & TEAM PROGRAM

TEAMING IS A GROWTH STRATEGY!

WE KNOW, AS A TEAM

YOUR WORK
“ON THE BUSINESS”
NEVER ENDS!

PAIN POINTS
WE HEAR YOU!

- → Partnering with Intention
- → Are You Ready to Scale?
- → Client Segmentation
- → Strategic Planning
- → Successful Succession Planning
- → Team Structure
- → Roles & Responsibilities

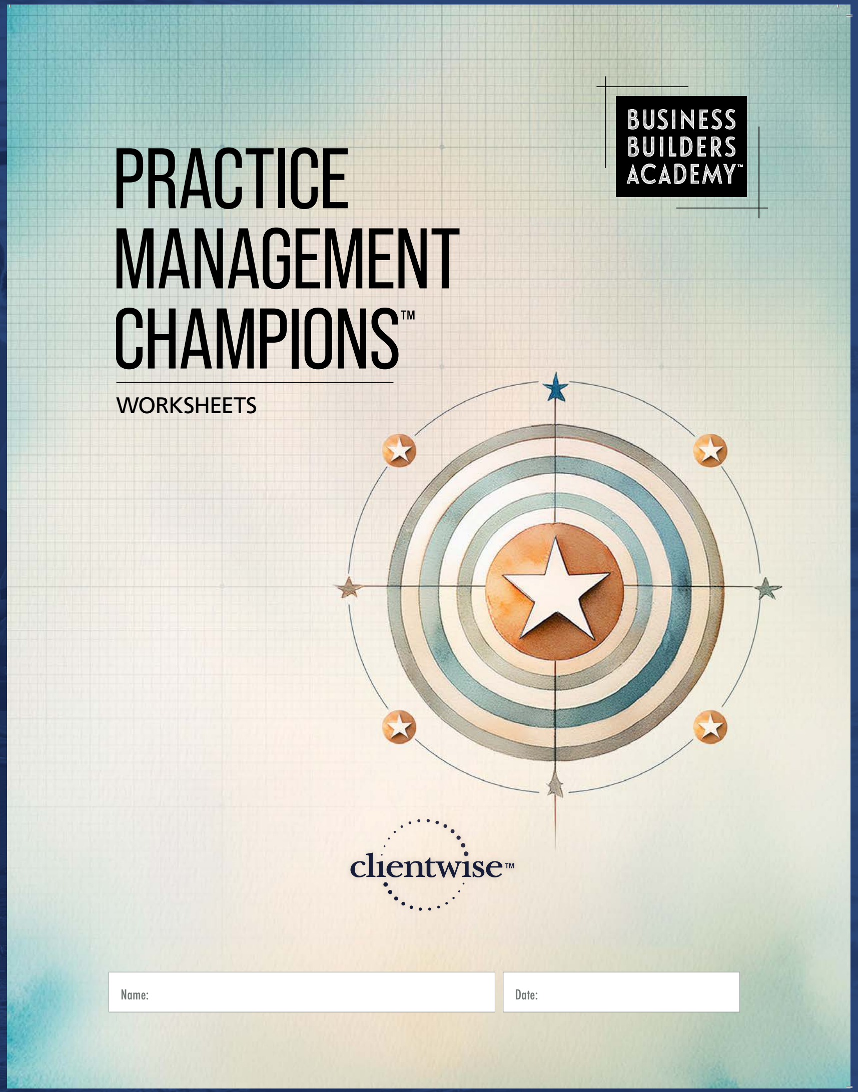
WORKSHOP SESSIONS

1. To be early is to be on time
2. Stick around afterwards
3. Join zoom from your own computer
4. Expect three exercises

IOQ

ISSUES | OPPORTUNITIES | QUESTIONS

A PROGRAM DESIGNED WITH YOUR TEAM IN MIND


PRACTICE
MANAGEMENT
CHAMPIONS™
WORKSHEETS
BUSINESS
BUILDERS
ACADEMY™
clientwise™
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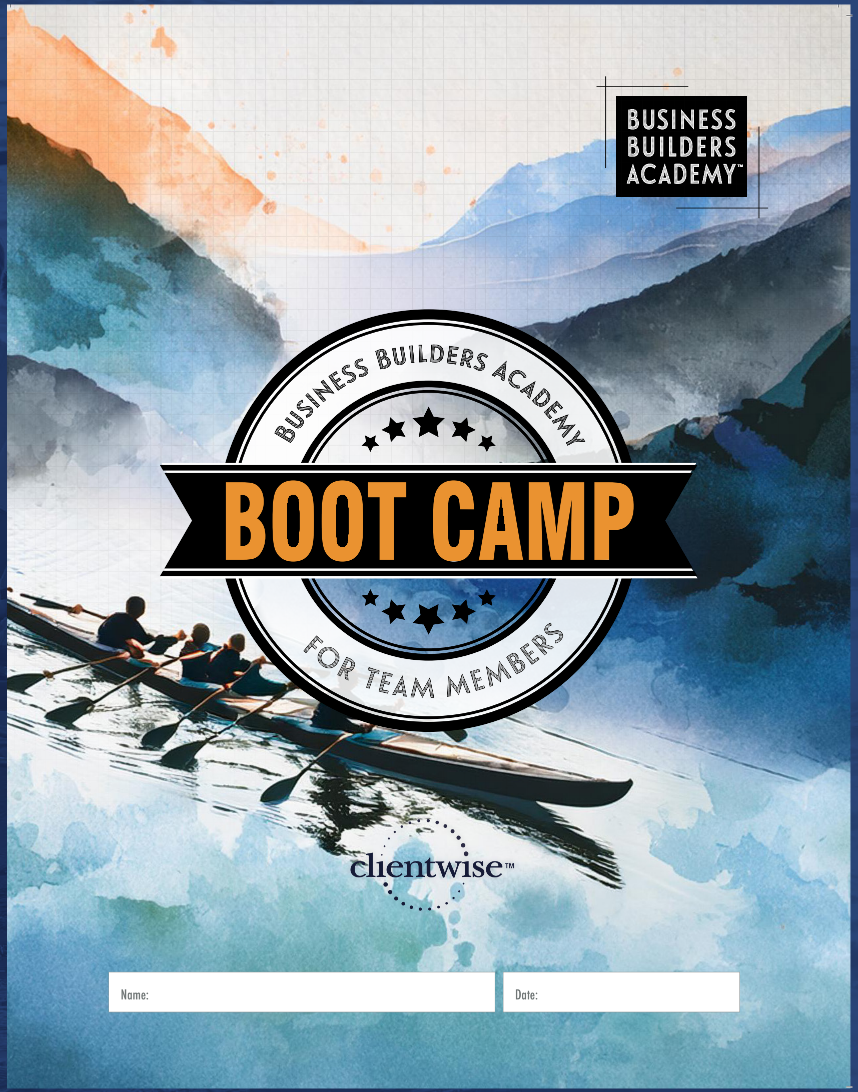
BUSINESS
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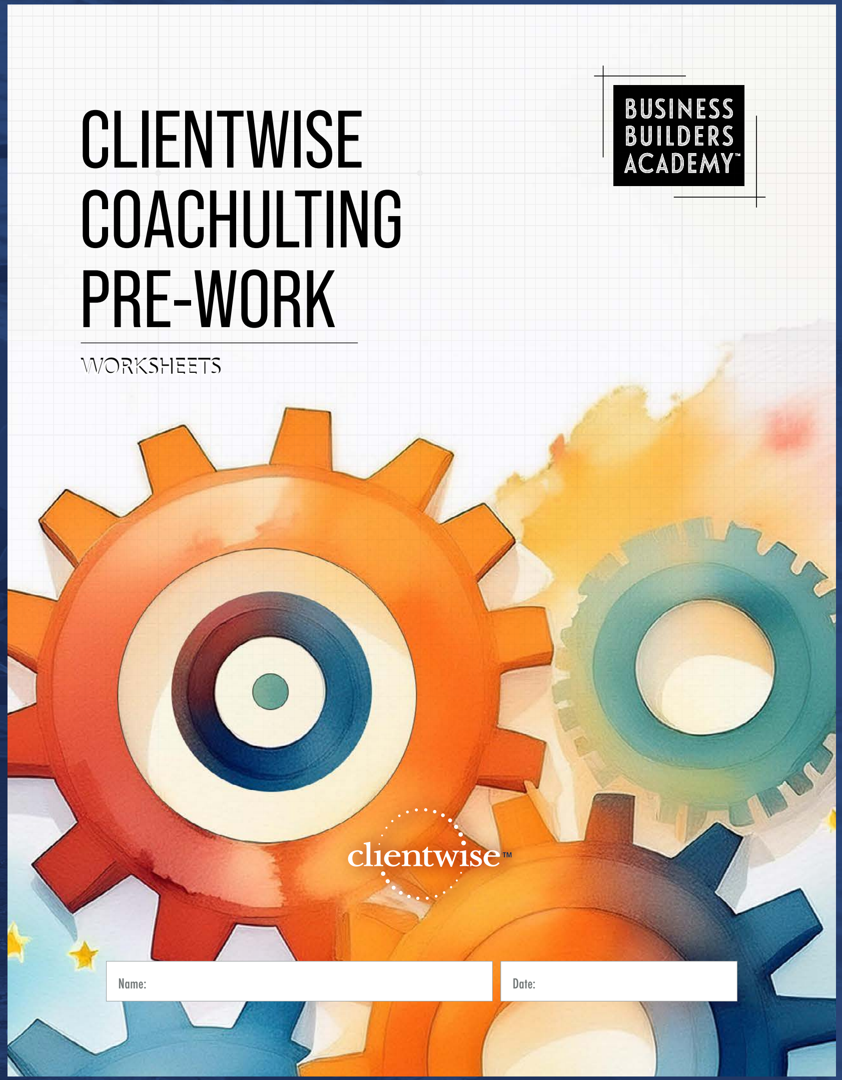
BUSINESS BUILDERS ACADEMY
BOOT CAMP
FOR TEAM MEMBERS
clientwise
Name:
Date:


CLIENTWISE
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PRE-WORK
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BUSINESS
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ACADEMY™
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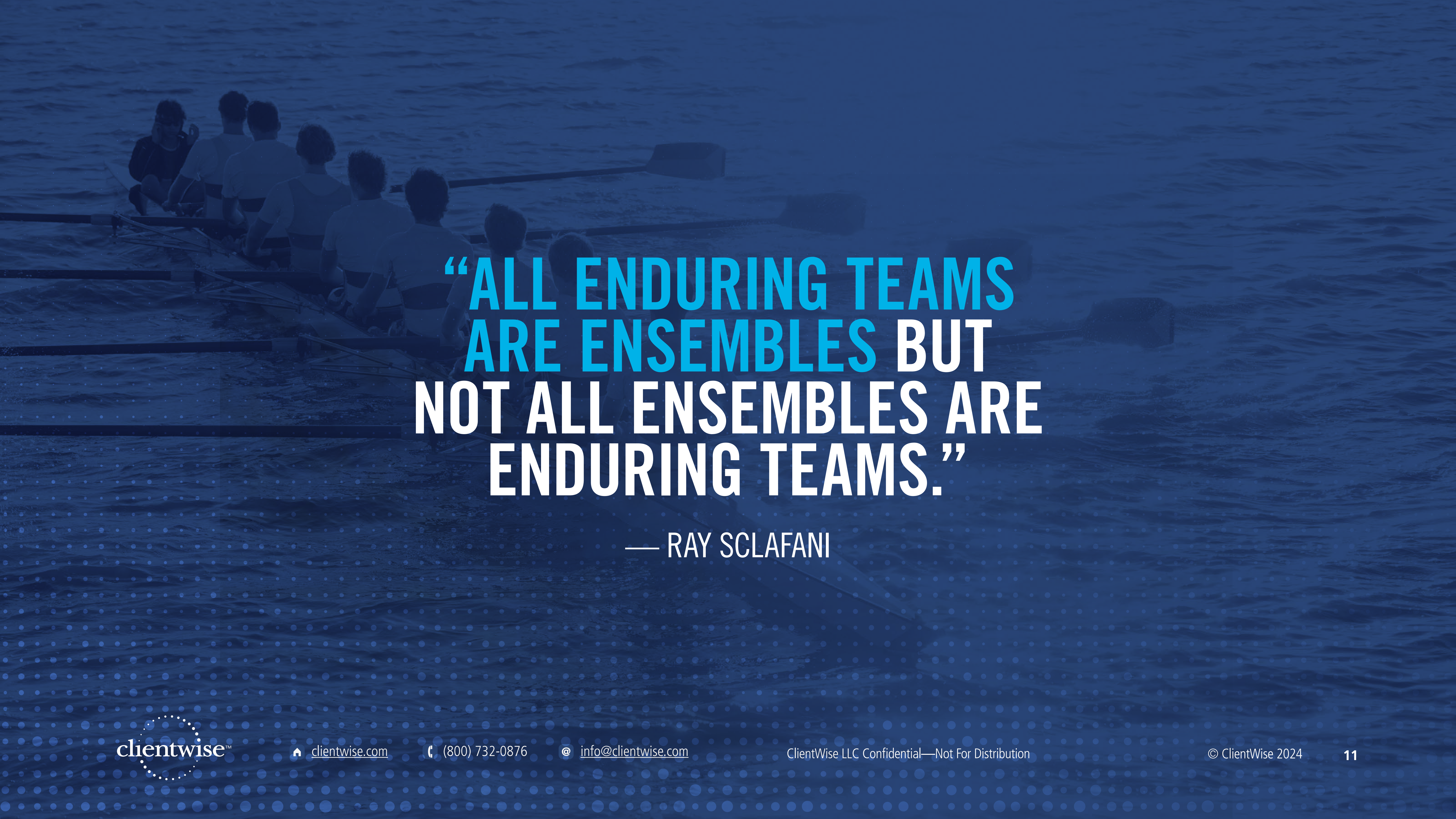


"ALL ENDURING TEAMS ARE ENSEMBLES BUT NOT ALL ENSEMBLES ARE ENDURING TEAMS."

— RAY SCLAFANI

PROGRAM ELEMENTS

BAR™ (Business Assessment Report)

The BAR™ allows you to benchmark your business against the best in the business. Developed exclusively for financial advisors with input from hundreds of elite advisors across the industry, the BAR™ shows you how you are managing your business relative to others.

Group Workshops

Workshops designed and facilitated by ClientWise. Intense agenda, group exercises, and results driven content. Active engagement is expected of each participant.

ClientWise Content

Get access to a library of proprietary content (including blogs, podcasts, research, tools, templates and actionable guides) developed from years of coaching some of the industry's elite advisors—leveraging learnings from our coaching partnerships, benchmarking data and industry trends analysis.

Practice Management Champion Support

This one-hour monthly webinar is designed and facilitated by ClientWise specifically for the Practice Management Champion (PMC) from each advisory firm. The webinar series is accompanied by a monthly facilitator guide for the PMC to leverage after the calls with their team.

Bootcamp for Team Members

Designed for all Team Members of a team; this 30-45 minute webinar provides a high-level overview of previously facilitated Business Builders Academy™ workshop content. Following the webinar, the Practice Management Champion (PMC) or implementer can discuss the content and include team members in building culture and accelerating team goals.

Proven Practice Webinar

From time to time, ClientWise will lead proven practice webinars featuring industry thought leaders, seasoned veterans, and content to help you learn from others and execute your plan more effectively.

BBA™ FOR ENSEMBLE LEADERS & TEAM MEMBERS

Sept 2024	Oct 2024	Nov 2024	Dec 2024	Jan 2025	Feb 2025
BAR™					
Virtual Group Workshops Kickoff		Virtual Group Workshops		Virtual Group Workshops	
★	★	★	★	★	★
Bootcamp for Team Members	Bootcamp for Team Members	Bootcamp for Team Members	Bootcamp for Team Members	Bootcamp for Team Members	Bootcamp for Team Members
ClientWise Content	ClientWise Content	ClientWise Content	ClientWise Content	ClientWise Content	ClientWise Content
	Proven Practice Webinars			Proven Practice Webinars	
	Coachulting™ Sessions		Coachulting™ Sessions		Coachulting™ Sessions

Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025
Virtual Group Workshops		Virtual Group Workshops		Virtual Group Workshops	
★	★	★	★	★	★
Bootcamp for Team Members	Bootcamp for Team Members	Bootcamp for Team Members	Bootcamp for Team Members	Bootcamp for Team Members	Bootcamp for Team Members
ClientWise Content	ClientWise Content	ClientWise Content	ClientWise Content	ClientWise Content	ClientWise Content
	Proven Practice Webinars			Proven Practice Webinars	
	Coachulting™ Sessions		Coachulting™ Sessions		Coachulting™ Sessions

- BAR™ (Business Assessment Report)
- Virtual Group Workshops
- ★ Practice Management Champion Program
- Bootcamp for Team Members
- ClientWise Content
- Proven Practice Webinars
- Coachulting™ Sessions

BBA™ Program Details

Program Participants:
1 Advisor
1 Practice Management Champion (PMC)

Program Tuition $16,000:
* Each additional participant $5,000

LEARNING OBJECTIVES

Organizing Priorities – Develop cascading Objectives & Key Results (OKRs) and empower your team to identify areas for improvement and celebration of success

Client Engagement Model – Design a proprietary client journey that enhances the experience and engagement of your ideal client and honors an integrated approach to financial planning

Client Acquisition Strategy – Develop an institutionalized business development process that supports a multi-generational strategy

Marketing Approach – Harmonize your team message through developing your Annual Marketing Plan and creating consistency among your delivery channels

Team Development – Bring alignment to roles & responsibilities, develop compensation & career paths that will attract and retain key team members, and build your strategy for developing G2 & G3

Professional Advocate Network – Strategically deepen your Advocate Network to support the needs of your ideal client as well as your Advocates

Business & Operations Management – Develop institutionalized Ensemble processes and procedures that increase operational efficiencies

NEXT STEPS

WHAT'S NEXT

1. Fill out or update your contact form

2. Pre-work prior to first workshop

Q&A

NEXT STEPS

1. Connect with your ClientWise Relationship Manager to learn more about the program and design preliminary coaching objectives and key results.
2. Make a decision to enroll in the Business Builders Academy™ for Leaders & Team Members.
3. Hold the dates on your calendar.

www.clientwise.com/edj

APPENDIX

APPENDIX

Executive Summary

COMPANY HIGHLIGHTS

- ClientWise: **Founded in 2006**
- **Business and Leadership Coaching**
- Supporting Advisors and Financial Leaders Committed to Building **Enduring Firms** for Their Clients
- Coaching Clients in the **USA, Australia, & Canada**
- Team of **45 Professionals** and Growing
- All ClientWise Coaches are **Credentialed** Master Certified or Professional Certified with the **International Coaching Federation**
- **Exclusive Coaching Partner** for Barron's Advisor
- Currently **Executing** our 5-year **10X Strategy**

TEAM OF PROFESSIONALS

- ClientWise was founded by Ray Sclafani after a 20-year career at AllianceBernstein, where he was one of the company's top sales professionals and executive leaders.
- In addition to Ray, the ClientWise management team includes fourteen full-time professionals and a roster of twenty-three highly-qualified executive coaches credentialed by the International Coaching Federation, the leading independent professional association for coaches.
  - Coaches are required to have Master Certified Coach ("MCC") or Professional Certified Coach ("PCC") certifications.
  - Each coach has a diverse background and knowledge base, having worked with executives in an array of industries across the globe.
  - Coaches are hand-selected to match the client's background and requirements.

PROFESSIONAL SERVICES

- ClientWise's full-service coaching programs empower financial advisors, wholesalers, managers and executives to enhance performance through customized, action-oriented solutions, based on each client's specific vision and situation.
- The Company offers an array of services, including:
  - **Private Client Coaching**
  - **Coaching Programs**
  - **Consulting Services**
  - **Keynote Speaking Engagements**
  - **Benchmark Assessment Reports**
  - **Licensing And Publishing**
- ClientWise's interactive approach to coaching emphasizes self-discovery learning methods and a nine-step process for establishing coaching objectives that clients apply to their practice through frequent check-ins and progress reviews.
- Clients achieve meaningful results working alongside a professional coach and learn to replicate those results, improving communication with staff, prospective clients, and centers of influence by sustaining the model established through their coaching partnership.
- ClientWise is regularly quoted in various media outlets as a thought leader; the Company's proprietary database, and community platform, The ClientWise eXchange™, houses a vast array of content covering issues facing the financial industry, which the Company leverages to produce articles, blogs and custom content.

APPENDIX

Our Understanding

EDWARD JONES
STRATEGIC IMPERATIVE

- ➜ Edward Jones is evolving its teaming platform
- ➜ Looking for a long-term coaching partner to advance and support the Teaming Model for its Advisors
- ➜ This support would need to include Branches, Advisors, and their Teams to evolve
- ➜ A key emphasis around retention of Financial Advisors
- ➜ Teaming as a growth strategy
- ➜ Teaming to increase client experience and outcomes
- ➜ Change management support from an objective partner

APPENDIX

Professional Coaching Services Offering

OVERVIEW OF COACHING PLATFORM

ClientWise aims to transform the financial services industry by providing tailored coaching services to individuals and teams of professionals across the industry. Professional services include:

- **Private Client Coaching:** ClientWise offers client-driven, individual coaching solutions, designed to target needs and identify specific goals to measure progress.
- **Coaching Programs:** the programs are a powerful combination of content, coaching and peer-to-peer learning.
- **Consulting Services:** ClientWise collaborates with clients to determine an appropriate financial and operational model, providing teams with the structure to support incremental growth.
- **Keynote Speaking Engagements and Presentations:** ClientWise coaches speak at various industry conferences, presenting on industry trends and best practices.
- **Benchmark Assessment Reports (“BAR”):** The Company leverages a proprietary database of industry and peer statistics to generate reports which rank and compare clients against industry standards.
- **Licensing and Publishing:** The Company produces proprietary coaching materials and guides, as well as articles, white papers and blogs on industry trends.

PRIVATE CLIENT COACHING PROGRAMS

ClientWise offers customized coaching programs:

➜ **The ClientWise Solopreneur Coaching Program™**
is designed specifically for individual advisors

➜ **The ClientWise Advisory Team Coaching Program™**
is designed for financial professional teams

➜ **The ClientWise Ensemble Coaching Program™**
is customized for large groups of professionals (e.g., advisory teams, divisions)

All include access to the Company's Platinum e-Library

Based on extensive research with over 5,000 top-performing financial professionals, the eLibrary provides virtual access to coaching materials via an online platform

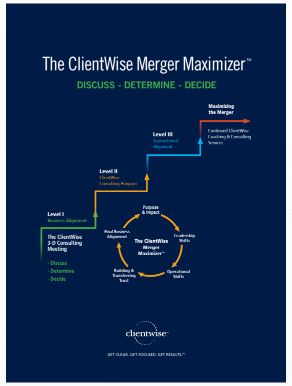
COACHING PROGRAMS

The Business Builder's Academy™

BUSINESS BUILDERS ACADEMY™

- The ClientWise Business Builder's Academy™ workshops utilize a blended style of learning and development, incorporate a coaching approach, and provide professional development and training to maximize the benefit for each participant.
- Workshops occur quarterly in our Dallas office or via a virtual workshop format six times yearly.
- The workshops are designed exclusively for financial professionals their company and team goals.
- Workshops educate advisor leaders on creating team structures and repeatable processes.
- Curriculum is organized around the ClientWise Professional Advisory Model™ and can be customized based upon company and team goals.
- ClientWise uses original and proprietary practice management content to empower each participant with action-oriented solutions tailored to the professional's circumstance.

COACHING PROGRAMS



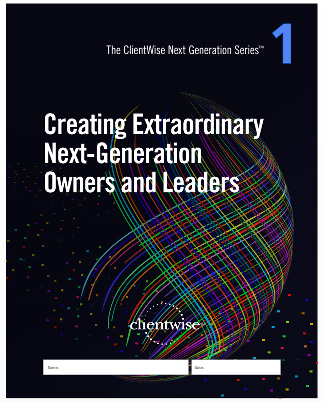
The Merger Maximizer Coaching Program™

When two or more firms are in discussions of merging, careful and extensive planning to define a good fit is paramount. This program is designed to be the first phase of a larger, comprehensive ensemble formation approach – an exploration of the underlying purpose, vision, and expectations each principal brings to the table. This a successful method of finding out whether the businesses can be aligned in such a way that the new enterprise will thrive.

The Acquisition and Transition Maximizer Coaching Program™

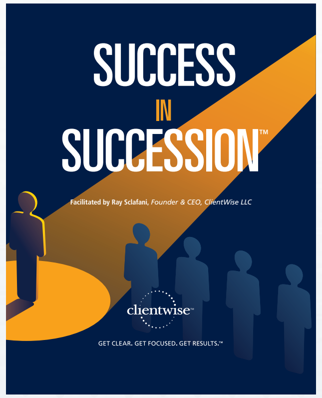
When firms are discussing the potential transfer of a book of business or the transition of a practice, open, in-depth conversations need to occur long before structuring the terms of a transaction. This program is designed to help create the space and place to plan for transfer issues as much as possible and have the best platform for a transaction and transfer success. Maximizing that success requires thoughtful planning for the care of clients, designing what you want to achieve from the transaction, and defining what the future roadmap looks like.

COACHING PROGRAMS



Next-Generation Series Coaching Program™

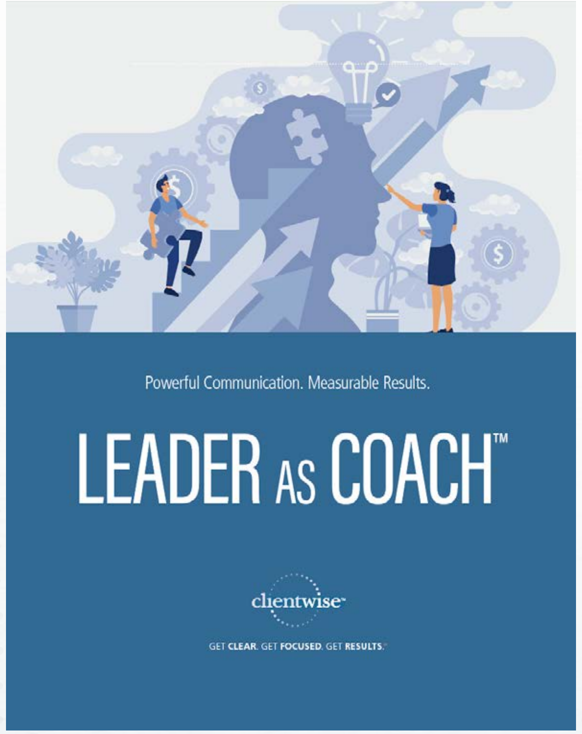
We are committed to helping firms keep the promise to always be there for their clients. We are equally committed to ensuring that founding and current owners can confidently transition firms to new owners and leaders who will continue their legacy. Achieving these aims requires specific and ongoing development of a partner/owner's mindset and skill set. This program is an ongoing series dedicated to that development and to every next generation successor becoming a remarkable owner and leader, ensuring that clients are taken care of and the legacy of accomplishment continues for each firm.



Success In Succession™ Coaching Program

The mission of this program is to help Controlling Owners and their Next Generation Partners better clarify succession goals and challenges through individual work and joint work together. The further mission of the work is to create a plan and set of actions to forward the succession process in a way that fully serves the Controlling Owner, the Next Generation partners, and creates a well prepared and smooth succession journey.

COACHING PROGRAMS



Leader as Coach Program™

This program allows the financial professional to render valuable coaching skills to peers, colleagues, mentees, and those they serve in any capacity within their work as financial professionals. The program was written by a master certified coach through the International Coaching Federations (ICF) who has written coaching training programs for industries and universities and is aligned with the ICF Core Coaching Competencies.

Benefits include:

- Partner with clients, team members, stakeholders and others in a profound way to advance organizational goals.
- Communicate skillfully to break down barriers, understand the positions and beliefs of others more fully.
- Build consensus among team members to achieve vital goals and objectives.
- Ask challenging questions that will bring important issues to the surface.
- Build consensus among team members to achieve vital goals and objectives.
- Ask challenging questions that will bring important issues to the surface.

COACHING PROGRAMS

- **All ClientWise signature coaching programs for advisory teams include a monthly group coaching session for all Practice Management Champions (PMC)**
  - Each advisory team nominates a practice management champion to help integrate content and tools, and execute on the coaching objectives and key results.
  - The PMC is a performative opportunity for leadership development.
- **All ClientWise signature coaching programs for advisory teams include access to the ClientWise Bootcamp for Team Members**
  - Each team member is included in ClientWise coaching through monthly webinars.
  - Key concepts, exercises, and industry trends are discussed and facilitated to support the team coaching model.
- **All ClientWise signature coaching programs for advisory teams include a Business Assessment Report (BAR)**
  - Each team completes a gap analysis utilizing a 100+ questionnaire to identify core issues and opportunities.
  - Coaching objectives and key results are easily identified using the BAR report.

BENCHMARK ASSESSMENT REPORTS

- **The Benchmark Assessment Report (BAR)™** allows the client to benchmark his/her financial advisor practice management against industry peers, helping to uncover specific areas to focus on, in order to improve the advisor's practice management skillset.

- Developed with input from hundreds of elite advisors across the country, the BAR™ shows how a particular advisor manages his/her business relative to other advisors in the seven key areas embodied in The ClientWise Professional Advisory Model.™
  - Organizing Priorities
  - Client Engagement Model
  - Client Acquisition Strategy
  - Marketing Approach
  - Team Development
  - Professional Advocate Network
  - Business and Operations Management

BENCHMARK ASSESSMENT REPORTS

➜ **The BAR™ includes:**

- A comprehensive 45-50 page written report detailing the results.
- A one-hour, private, one-on-one coaching session with an experienced ClientWise coach.
- An executive summary and guidebook that the advisor can use as a road map for a more productive future.

BENCHMARK ASSESSMENT REPORTS

Three Steps to completing the BAR™

Benchmark
Your Practice

1 Complete the online survey. Your answers are then compared to those of other top advisors and analyzed by a ClientWise coach.

Focus
and Prioritize with a Coach

2 Discuss your results with a ClientWise coach and outline a more specific plan for improvement and growth.

Implement
Your Plan

3 Put your new plan into action to achieve the financial rewards you want—both for you and your clients.

THE PROFESSIONAL ADVISORY MODEL™

ClientWise has designed a systematic model to help enhance performance and achieve results

Organizing Priorities guides the financial advisor to define the vision and arrange the priorities within the business plan that require a highlighted focus on a daily, monthly, or annual basis

Client Engagement Model™ involves all interactions between the advisor, the advisor's firm and the client

Client Acquisition Strategy™ is the strategy, approach, tactics and execution of acquiring and on-boarding new clients

Marketing Approach is the disciplined planning and strategy that precedes the tactical aspects of client acquisition (i.e. building a marketing plan and budget, identifying target markets, implementing technology and CRM, developing a clear and concise message, creating marketing materials, etc.)

Team Development is all of the activities and behaviors necessary for the growth and maintenance of a high-performing team

Professional Advocate Network™ is the collection of trusted advisors who work together in a mutually-defined relationship for the benefit of the client, where business professionals provide high-quality introductions to other members of the outlined network

Business & Operations Management is an all-inclusive category that absorbs much of the necessary and practical aspects of running a profitable and sustainable business, including P&L responsibilities, compliance and workflow processes

APPENDIX

Our Approach

THE CLIENTWISE COACHING PARTNERSHIP PROCESS™

Get Clear — 1 **Get Started**

- Outline possible coaching objectives with your dedicated ClientWise Relationship Manager
- Make decision to sign letter of agreement and invest in the coaching partnership
- ClientWise Coach Connect™ choose your coach with support from our team

Get Focused — 2 **Establish Specific & Measurable Coaching Objectives and Key Results with your Coach**

- Clearly stated goals and outcomes for coaching partnership
- Clearly understood purpose of achieving stated goals and outcomes
- Clearly stated issues to discuss or solve to achieve goals and outcomes

Get Results — 3 **Claim Your Learning**

- Begin series of coaching calls focused on your specific coaching objectives
- Engage in regular and quarterly reviews to measure your progress
- Evaluate, learn and adjust

Achievement of Coaching Objectives

APPENDIX

Clientwise Team

THE CLIENTWISE TEAM

Ray Sclafani, President & Founder

After 20 years at AllianceBernstein, Ray Sclafani founded ClientWise, the premier coaching and training company exclusively serving the financial services industry. Ray's passion for serving leaders, advisors, and companies in the financial services sector is reflected in ClientWise and its unique coaching programs and team of credentialed coaches that help advisors and companies find the next level of professional excellence and financial success with greater focus and ease.

Ray's experience as a seasoned specialist in coaching and training in the financial sector mirrors his long and profitable history in the industry. In his 20 years at AllianceBernstein, Ray was one of the company's top sales professionals and executive leaders. His knowledge of how to create and execute on highly successful sales plans and build long lasting client connections was later utilized as founder and Managing Director of the Advisor Institute at AllianceBernstein. In that role, he developed and directed an extensive series of programs that proved invaluable to advisors in creating improved and sustainable motivation, sales, and client relationships.

Ray completed his transition to founding ClientWise through significant coaching education and practice that led to his recognition as a Professional Certified Coach (PCC) from the International Coaching Federation, the leading independent professional association for coaches. As a complement to his coaching skills, he also holds a Master's Certification in Neuro-Linguistics from the International Association for Neuro-Linguistic Programming and has participated in The Strategic Coach Program. *(cont.'d)*

THE CLIENTWISE TEAM

Ray Sclafani, President & Founder (cont.'d)

Ray's expertise as a coach and trainer is recognized and sought out by leaders within the profession. Through ClientWise, he has provided coaching or created and presented workshops for, among others, Merrill Lynch, Morgan Stanley Smith Barney, LPL, Raymond James Financial, and Ameriprise. In addition, he has spoken on request to major industry conferences and company events for firms such as Merrill Lynch for their Diversity & Training programs, LPL, MSSB Institutes Conferences, Raymond James, FSC Securities, as well as the FPA National Conference, John Hancock Funds Wholesaler Conference, Nationwide Financial Summit Sales Conference, Met Life Presidents' Conference, Barron's Winner's Circle Summit, and Barron's Top Advisory Teams Summit. He has authored "The High Performance Coach", a monthly column for Investment Advisor magazine, and has been interviewed and quoted in the Wall Street Journal, Financial Planning magazine, and Registered Rep, to name a few. Ray is the author of *You've Been Framed: How to Reframe Your Wealth Management Business & Renew Client Relationships*. Ray holds a BA from Baylor University. He lives in Flower Mound, Texas with his wife and true life partner, Beth. They have two sons who continually inspire Ray's work and his passion for excellence.

Jerilynn Hallett, Executive Assistant to Ray Sclafani

Before joining the ClientWise team, Jerilynn worked in a variety of fields. She was Manager of Environmental Services at a physical rehabilitation facility, a Yacht Stewardess on a private yacht and a Banking Customer Service Representative. These positions have equipped her with the skills necessary to serve a wide range of personalities and conquer the most demanding tasks. She is always willing and eager to take on new challenges.

THE CLIENTWISE TEAM

Shawn Elder, Chief Operating Officer

After 28 years supporting large financial services firms, Shawn Elder joined the ClientWise team as the Chief Operating Officer. He spent 12 years at CapitalOne in a variety of leadership roles including Director of Technology leading complex technology investments and Director of Process Engineering leading operational transformations. He spent a combined 10 years at JPMorgan Chase as an Executive Director leading several operations and risk teams. With a keen focus on equipping, encouraging and empowering our internal team to achieve greatness, Shawn is committed to delivering superior customer value through exceptional structure that enables people to focus on doing what we do best as we serve our clients. Shawn holds a BBA in Accounting from The University of Texas at Austin.

Sophia Harbas, Director of Coaching Services

Sophia Harbas has more than 20 years of experience in financial services management, including business development, client relationship management and marketing. She spent 18 years at AllianceBernstein in a variety of management and executive roles, including vice president of sales data and marketing operations and assistant vice president of cash management services. Intimately familiar with the financial services industry and the changes it has undergone in the past 20 years, Sophia is committed to delivering superior customer service to ClientWise's broad base of individual, team, management and institutional clients. She has a B.S. in Accounting from St. Peter's College in Jersey City, NJ and is recognized as a Professional Certified Coach (PCC) from the International Coaching Federation. As Director of Coaching Services, Sophia is responsible for onboarding clients and new coaches, facilitating coaching relationships and overall administration of the coaching programs at ClientWise.

THE CLIENTWISE TEAM

Margaret Krigbaum, Chief Program Developer

After 11 years in private law practice, Margaret transitioned to coaching in late 1994, in the early years of the coaching profession. With over 15 years of coaching experience, her broad range of clients includes Fortune 500 companies, C-Suite and senior executives, and executives and professionals in the sectors of financial services and law. Margaret coaches issues of significance for her clients, including executive and leadership development, strategic planning with bottom line results, team communication and growth, individual brand development and professional progress, as well as mentoring advanced coaches in continued growth of their coaching skills. Her international client base extends throughout the United States and to Europe and Asia. She has coached over 1,500 clients, 10,000 hours, and has coached individuals and teams in 26 different countries.

Lauren Kaufman, Senior Business Consultant

Lauren Kaufman is a Senior Business Consultant at ClientWise. Lauren has a BA in Communications with a minor in Mandarin from the University of Colorado-Boulder. Lauren spent 8 years at Dimensional Fund Advisors where she worked with advisors and firms of all sizes on their practice management and growth strategies. Most recently, Lauren was the Lead Coach at Limitless Advisor Coaching. Lauren's unwavering passion for excellence, both personally and professionally, continues to inspire and drive her commitment to empower firms to achieve unprecedented levels of success. Lauren currently resides in Austin, TX with her husband and two French Bulldogs, Tater Tot and Queso. Outside of work she enjoys trying new restaurants, working out at F45, and reading the latest historical fiction novel.

THE CLIENTWISE TEAM


Rebecca Bradley


Shawna Corden


Sholeh Dadressan


Ellen Fredericks


Andrea Gemma


Bobbi Gemma


Molly Gordon


Leah Grant


Jen Howdeshell


Miriam Hyman


Regina Koetters


Russell Long


Terrie Lupberger


Rich Maxwell


Helene Mazur


Jayson Morris


Trish Perry


Pamela Richarde


Elias Scultori


Jeff Staggs


Dr. Patrick Williams

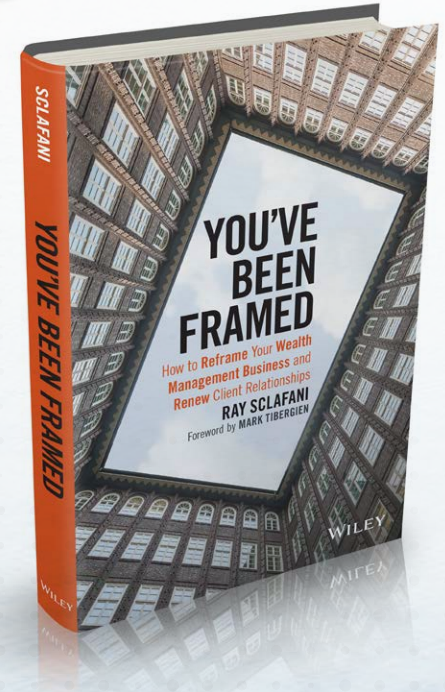
APPENDIX | Barron's Advisor

CLIENTWISE + BARRON’S PARTNER

- ClientWise named the exclusive advisor coaching partner to Barron’s Advisor, November 2020.
- The Barron’s Advisor and ClientWise relationship was forged to help raise the standards of client care in wealth management.
- Partnership objective: To further our commitment to helping raise the standards of client care in wealth management, Barron’s has joined forces with ClientWise as our exclusive coaching partner to help advisors build enduring firms with growing enterprise value, assisted by Barron’s deep research and data capabilities.
- ClientWise partners to support the development of all conference agendas, prepare select speakers, deliver presentations and moderate panels.
- ClientWise and Barron’s have agreed to explore the building of custom benchmarks for broker dealers and custodians for the purpose of creating:
  - An internal measure of success against top advisors and
  - An external measurement of top advisors against Barron’s top-ranked advisors

APPENDIX | Sample Content


Building The
Billion
Dollar
Business
with RAY SCLAFANI
Financial Advisor Coach


YOU'VE
BEEN
FRAMED
How to Reframe Your Wealth
Management Business and
Renew Client Relationships
RAY SCLAFANI
Foreword by MARK TIBERGIEN
WILEY
SCLAFANI
YOU'VE BEEN FRAMED


Enterprise Value
10 Drivers
Value
How to Scale
Your Business
3 Suggestions to Help
5 Things Every
Potential Acquirer
Should Consider
Intentional
Growth
6 Questions &
4 Key Considerations
Successful
Next Generation
Leaders
8 Essential Qualities
Successful
Advisory Teams
5 Traits to Model and
20 Behaviors to Avoid
clientwise


Business and Operations Management • Succession Planning
New Success in Succession™ Program Addresses Glaring Gap
PRODUCTIVITY
3 Important Areas of Team Productivity to Focus on
Time is the ultimate equalizer. A couple of years ago, I reviewed the results of a time management and productivity study conducted by Michael Kitces. He found th less...
Client Acquisition • Marketing Approach •
Enduring Firm • Business Continuity
12 Keys to Building an Enduring Firm
If building an enduring business – one that cares for future generations (of both clients and advisors) – is important to you, then now's the time to start planning. But...

APPENDIX

Client Feedback of Coaching Achievements

WHAT OUR CLIENTS SAY THEY ACHIEVED

- Higher Owner & Partner Satisfaction
- Accelerated Growth
- Increased Profitability
- Maximized Enterprise Value
- Increased Efficiencies
- Enhanced Client Experience & Engagement
- Lower Team Turnover
- Decreased Partner Divorce Rate
- Fulfilled Promises made to Clients

FOR MORE INFORMATION

www.clientwise.com/edj
800.732.0876 ext. 501

Visit our website:
clientwise.com

Read our blog:
clientwise.com/blog

Connect with us on LinkedIn:
clientwise

Follow us on X:
@clientwise

Follow & listen to our latest Podcast:
Building The Billion Dollar Business