

KEYNOTE  
PRESENTATION



# “Breaking Through” Business Thresholds

Today’s wealth adviser is not in a fee compression world; they are in a value compression world. It takes more than service, advisory processes and digital branding to break through business thresholds, let alone keep your business sustainable. You need to structure your practice away from your point of view and focus on the client’s point of view. This involves defining your value and client experience from the markets you want to serve, gaining efficiency in your operational systems, and clarity within your team. This session will cover 10 critical practice management considerations to help you refocus and gain velocity as you cultivate clients and solidify your distinction in the marketplace.

## *The 10 Featured Strategies Include:*

- *Avoiding the most common mistakes when explaining your value*
- *Assessing and developing viable markets for sustainable growth*
- *What to focus on as your practice and team matures*
- *How to evolve your service model to maintain scale and efficiency*
- *Getting your team to deliver on the client experience*

Suggested Presentation Time: 60 minutes

