

KEYNOTE
PRESENTATION



The Hidden Obstacles to Growing a Financial Practice

Financial advisors are often told by leadership or outside consultants to “grow your financial practice,” expand your AUM, or increase activity. The challenge with growth-based goals is they often overlook the obstacles and historical sticking points that plague an advisor’s business. If you want to grow your financial practice, but feel stuck, the following strategies and exercises may help you push past the obstacles and identify new opportunities.

You Will Learn:

- The right way to articulate your value to clients
- How to right-size your business
- Creating a marketing and client cultivation calendar
- Time management wasters
- Gaining warm introductions and referrals
- How to take a life and business inventory

Suggested Presentation Time: 60 minutes

