CLIENTWISE SPEAKERS BUREAU

clientwise™

GET CLEAR. GET FOCUSED. GET RESULTS.

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 Coach 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
SPEAKERS BUREAU

Our Speakers Bureau is comprised exclusively of the highest accredited International Coaching Federation (ICF) coaches and executives, who have spent years in the industry working with top-performing financial professionals.
Their insight and ability to inspire the thinking needed to achieve your greatest potential is unparalleled.

The ClientWise Research Approach™ Provides Unique & Relevant Content

The ClientWise Research Approach™ fuels our speaking programs and simultaneously imparts new learning about the financial services industry. By gathering and analyzing data around how the industry is currently working, we are able to provide insight into how to improve it. The research that informs our content is collected from three models that enable us to collaborate with leading industry influencers, and shape industry trends and ideas.

  clientwise.com clientwise.com/blog (800) 732-0876

Coach Insights Database™

Our ClientWise Coach Insights Database™ is used by all of our International Coaching Federation credentialed coaches to track and record the progress of financial professionals during coaching sessions.

- ➜ Provides ClientWise real-time insight into what financial professionals encounter on a daily basis, while remaining completely confidential.
- ➜ Highlights key trends and concerns for financial professionals.
- ➜ Guides our approach in both one-on-one and workshop coaching.
- ➜ Ensures we are providing relevant content and delivering insight that is meaningful to top-performing advisors and financial leaders today.

ClientWise Community Feedback

Our ClientWise Community Feedback casts a much wider net to gauge the activity, challenges, and successes of all industry professionals involved in the ClientWise online community.

- ➜ Using a proprietary software model incorporating inbound marketing, social media, blogging, and activity within the ClientWise Exchange™, we keep our fingers on the pulse of what advisors are seeking from the digital world.
- ➜ This information is used to create content that speaks to the industry as a whole, while targeting specific points that are central to the success of advisors and financial leaders at the level we coach.

The Benchmark Assessment Report (BAR)™ Data

Our ClientWise Benchmark Assessment Report (BAR)™ is a practice evaluation tool, created by in-depth research and interviews with high performing advisory teams.

- ➜ The BAR™ compares other practices to those of the highest caliber, and identifies specific tactics and strategies for improvement within critical areas of Practice Management.
- ➜ The analysis generated from the BAR™ includes a customized 45-50 page report detailing each individual or team assessment.
- ➜ These reports confidentially inform our speaking and workshop material.

ClientWise Speakers Bureau Offers a Variety of Topics in 5 Distinct Formats

HIGH-IMPACT KEYNOTES - Our keynotes are singular experiences designed to stimulate new learning within financial services. Inspired by some of the most powerful thought leaders and key influencers in the industry, they are facilitated by our coaches and geared toward financial professionals seeking sustainable skills to benefit their clients, their businesses, and the industry overall. Each keynote is customized around the time and topic, and specifically geared toward each audience.

BREAKOUT SESSIONS - Our breakouts are the perfect addition to any workshop or conference. Fueled by industry leading trends and research, they are driven by real-time statistics that provide actionable insights into practice management. As one of our more popular formats, they cover a large variety of topics that can be tailored to a given theme.

PANEL DISCUSSION FACILITATION - Whether for an industry conference or your firm's annual meeting, a well-facilitated panel discussion can make or break the event. Our ability to design agendas, prepare panelists and facilitate a focused exploration of key topics helps you deliver critical insights and learning to your audience in a way that engages them through the personalities, stories and experiences of your panelists. We also have expertise in designing and facilitating women-specific events.

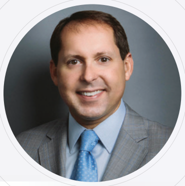
QUICKSTART WORKSHOPS - Broken into 45-minute long interactive workshop sessions, these unique programs are perfect for firms looking to jump start a project, or brainstorm and quickly inspire strategic thinking in a short amount of time. Advisors will often use these in addition to their coaching sessions for a deeper dive into a specific area.

INTENSIVE WORKSHOPS - Our one-day or quarterly workshops offer in-depth insights on a variety of subjects in full day, half day, or two day time frames. They provide extensive and continuous learning opportunities within a select community of top-performing financial professionals, and offer access to our proprietary tools and resources.

	Keynote	Breakout Session	Quickstart Workshop	Workshop	SPEAKERS BUREAU TOPICS
Organizing Priorities	▲	✖	●		All In: Lifetime Maximizer™
				■	Business Builders Academy™
Marketing		✖	●	■	Articulating Your Powerful Value Proposition™
		✖			The Essential Elements of Social Networking™
		✖	●		Leveraging Social Networking™
	▲	✖	●	■	You've Been Framed™
	▲	✖	●	■	The Essential Elements of the Marketing Approach™
		✖	●		Five Tips to a Powerful Brand™
Team Development	▲	✖	●	■	The Leader's Journey: From Lone Ranger to Leader™
	▲	✖	●	■	Letting Go to Grow™
	▲	✖	●	■	Seven Steps to Developing a High Performance Team™
			●	■	Team Talent Review™
	▲	✖	●	■	Beyond Teaming: Your Business Built for Growth™
	▲	✖	●	■	Vision: Defining Your Future Team™
	▲	✖	●	■	Shift Your Human Capital Perspective™
	▲	✖	●	■	Want to Grow Your Enterprise Value?™
				■	Team Insights 360™
				■	DISC Assessment Report™
				■	Emotional Intelligence Assessment™
				■	Strategic Planning for Team Leaders™
Client Engagement		✖	●		The At Risk Client Assessment™
		✖	●		On-Boarding New Client Relationships™
Client Acquisition	▲	✖	●	■	Building the Client Acquisition Process™
	▲	✖	●	■	The Professional Advocate Approach™
	▲	✖	●	■	Building Loyal Client Advocates™
		✖	●		The Advocate Approach Self Assessment™
	▲	✖	●	■	5 Keys to Leading an Advocate Approach™
		✖	●	■	15 Tips for Networking on LinkedIn™
Business & Operations Management	▲	✖	●	■	The Levers for Maximizing Enterprise Value™
	▲	✖	●	■	Financial Advisor as CEO™
	▲	✖	●	■	From Ensemble to Enterprise: The Value Drivers That Matter Most™
	▲	✖	●	■	Seven Part Roadmap for Practice Management Growth™
	▲	✖	●	■	Seven Decisions for a Successful Future in Financial Services™
Coaching Skills	▲	✖	●		The Hallmarks of Mentoring™
	▲	✖	●		The 7 Skills of Emotional Intelligence™
		✖	●		Top Ten Habits of Effective Study Groups™
				■	The Certified Financial Services Coach Training Program™
	▲	✖	●	■	The Characteristics of Collaborative Conversations™
		✖	●	■	Collaborative Conversations for Strategic Results™
	▲	✖	●		Partnering to Create Powerful Coaching Conversations™
		✖	●	■	Four Types of Collaborative Conversations™
	▲	✖	●	■	Customized Coaching Skills for Financial and Insurance Wholesalers™

Our Speakers Are Credentialed Coaches With Experience in the Financial Services Industry

All of our speakers are highly credentialed coaches with the International Coaching Federation (ICF), and have extensive experience in the financial services industry. As ClientWise coaches, they bring a unique set of experiences to each and every engagement that allows them to understand and address the challenges and opportunities faced by financial professionals on a daily basis.



Ray Sclafani, *Founder & CEO, PCC*

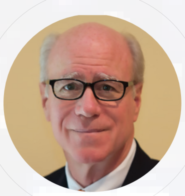
An experienced financial services professional, Ray brings 20 years of experience as an executive at a large asset management firm to ClientWise LLC, which he founded in 2006. He received his Professional Certified Coach designation from the International Coach Federation, the leading independent professional association for coaches. 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, Northwestern Mutual, Merrill Lynch, Morgan Stanley Wealth Management, LPL, Raymond James, and Ameriprise Financial. 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, Morgan Stanley Institutes Conferences, Raymond James, FSC Securities, as well as the FPA National Conference, John Hancock Funds Wholesaler Conference, Nationwide Financial Summit Sales Conference, MetLife Presidents' Conference, Northwestern Mutual Forum, Northwestern Mutual Annual Meeting, Barron's Winner's Circle Summit, and Barron's Top Advisory Teams Summit. He has been interviewed and quoted in the Wall Street Journal, Financial Planning magazine, and Registered Rep, to name a few. Ray's book, "You've Been Framed: How to Reframe Your Wealth Management Business and Renew Client Relationships," was published by Wiley in 2015.

Margaret Krigbaum, JD, *Chief Program Developer, MCC*
Margaret is tasked with transforming general coaching curriculum into programs specifically designed to improve the communication and relationship partnering skills of financial professionals. With more than 15 years of coaching experience, her clients include Fortune 500 companies, C-Suite and senior executives, attorneys and financial professionals. Margaret coaches issues of significance for her clients, including executive and leadership development, strategic planning with bottom line results, team communication, growth and individual brand development and professional progress.

Teresa Easler, *Workshop Facilitator*
Teresa Easler has more than 30 years of experience as a marketing and management strategist and corporate coach. Founder of Connect to the Core, a company that breaks down the barriers between communications and sales, Teresa has worked with business leaders, entrepreneurs and companies to grow sales and create new systems and processes. A born entrepreneur, she founded several other companies before joining ClientWise.

Bobbi Gemma, *MCC*
Bobbi Gemma has been coaching financial professionals and industry leaders for almost a decade. Bobbi was a founding member of the International Coach Federation (ICF), and is founder and leader of the Coastal Carolinas Chapter of the ICF. Since 2009, she has been an adjunct faculty member of the Proficient Coaching Certificate Program at the University of Miami. Bobbi has managed the career center for an outplacement firm, was President of a marketing resources firm, and serves on a number of boards for training and organizational development groups.

Jeff Staggs, *MCC*
A Master Certified Coach, Jeff has designed and delivered the first coaching program to be fully integrated into an MBA program for Capella University. An experienced executive coach, Jeff's guidance enables his clients to take on new business and personal challenges and to achieve new levels of balance and performance—akin to the world-class athlete who seeks intensive coaching to move from silver to gold medal victories.

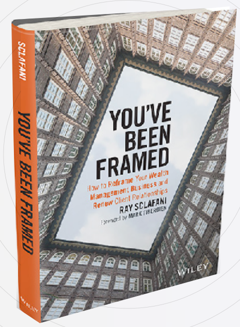


Rich Maxwell, *Executive Coach*
Rich Maxwell has been a leader in the coaching field since 1996. He specializes in leadership and team coaching. Having spent 20 years as a hospital executive, he successfully dealt with mergers, acquisitions and sales of hospitals, and the attendant challenges that inevitably arise following such transactions. His leadership experience helps him guide executives and teams to leverage strengths and effectively navigate change. Rich has served as a faculty member for CoachU and the Business Coach Institute, where he helped train coaches worldwide.

Ellen Fredericks, *MCC*
A Master Certified Coach, Ellen has many years of experience coaching executives, leaders, and business professionals to take their individual, team and business performance to the next level. As a former corporate executive, Ellen brings twenty plus years of management and business experience to her coaching from the telecommunications and information technology industries where she managed multi-million dollar start up and turnaround initiatives.

Customizable Content Around Industry-Leading Trends

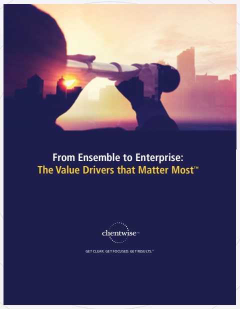
While ClientWise creates customized presentations and speaking engagements for many occasions, we also have several popular research-driven programs, created from industry-leading data, that are frequently requested by top advisors and advisory teams. In this brochure, you will find descriptions of our most requested programs, which can be tailored to any format that best suits your needs.



You've Been Framed!™

You've Been Framed: ™ Reframe your wealth management practice and renew client relationships to achieve sustainable success in financial services. Like it or not, you've been framed. It's time to become conscious of the frame that you are seen through by your team, your clients, the public, and the media—so you can make intentional decisions that guide how others perceive you and your firm. Whether you are a savvy entrepreneur, a more experienced advisor moving toward selling your practice, or a lifelong learner, this session will provide you with some of the key insights and tools needed to proactively reframe your business. Learn to assess how your clients currently frame you; Look to eliminate gaps between the services you provide and the services your clients' need; Define a more powerful frame for your business that allows you to attract and serve your ideal clients; Renew client relationships and attract new demographics; Develop a powerful network of client and professional advocates. Throughout the process, enrich your leadership effectiveness with proven team-building tools.

From Ensemble to Enterprise: The Value Drivers That Matter Most™

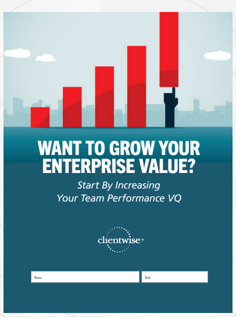


As the industry undergoes transformative change, M&A activity has taken center-stage. Whether your firm is active in the M&A space, exploring acquisitive growth strategies, or simply contemplating the future sale of your own firm, preparing for every transaction is the key to success. In this fast-paced presentation, filled with a number of tools and content for you and your team, Ray Sclafani will deliver the ten value drivers that matter most and provide a framework to help your firm better prepare to acquire, sell or team up with an existing practice.

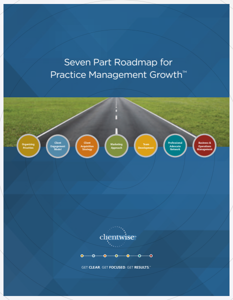
Shift Your Human Capital Perspective: Recruit, Retain And Reward Talent Like An Asset Rather Than A Liability™

As the competitive landscape and the demand for top talent intensifies, the lack of human capital entering financial services just may be our industry's greatest threat. Invariably, it will be the leaders who can effectively recruit, retain, and reward human capital whose firms will experience the lion's share of enterprise value growth. In this fast-paced session, ClientWise CEO and Founder Ray Sclafani will provide vital insights and actionable steps to help you rethink your compensation plan and build a culture that will deliver better business results utilizing your most important asset…your team!

Want to Grow Your Enterprise Value? Start By Increasing Your Team Performance VQ™



Velocity Quotient (VQ) is a measure of the time and resources that will be required to achieve desired results. The higher your firm's VQ, the more you can achieve with less. This facilitated session will help you design an action-oriented structure that you can begin immediately implementing with your team. ClientWise CEO and Founder Ray Sclafani will outline the drivers of enterprise value that are within your control, show you how to frame those for the team, and help you create four, 12-week "sprints" to guide your team to increase your organization's VQ.

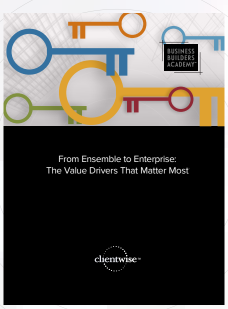


Seven Part Roadmap For Practice Management Growth™

Seven Part Roadmap For Practice Management Growth™ uses ClientWise proprietary assessments to determine a financial advisor's potential for progress and their best path to achieve success. It looks at everything from an advisor's coachability quotient to their length of service and, using The ClientWise Professional Advisory Model™ and key findings from top performing financial advisors, charts a course for moving forward. Taking into account things such as optimal allocation of time and making the most of conversations with clients, it provides advisors with a different perspective and highlights the changes necessary for success.

The Leader's Journey: Key Transitions From Lone Ranger To Leader™

The Leaders Journey™ guides successful solopreneur advisors as well as team leaders looking to bring about transformational change. The ten specific transitions outlined in this program will guide advisors around how to step into a CEO role, and how to build, sustain, and coach high-performing teams.

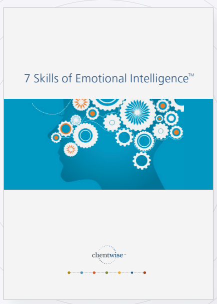


The Key Drivers For Maximizing Enterprise Value™

In order to stay relevant today and position their businesses for durable growth and sustainability, advisors must be focused on building enterprise value. In this presentation, we identify the ten focus areas that contribute to enterprise value including defining one's legacy, installing a Loyal Client Advocate™ structure, and creating a specialized multi-generational client service model. By focusing on these activities, advisors will enhance both the current and future enterprise for themselves, their teams, and most importantly, for their clients.

Building The Billion Dollar Business™

Building The Billion Dollar Business™ is a comprehensive program designed to break down your practice and provide you with the strategies and tactics necessary to transition from being a top producer to running an entire practice. You'll learn concepts around increasing profits, exponentially increasing your business' capacity and scale, and unlocking the power of shared responsibility for rainmaking results.



7 Skills Of Emotional Intelligence™

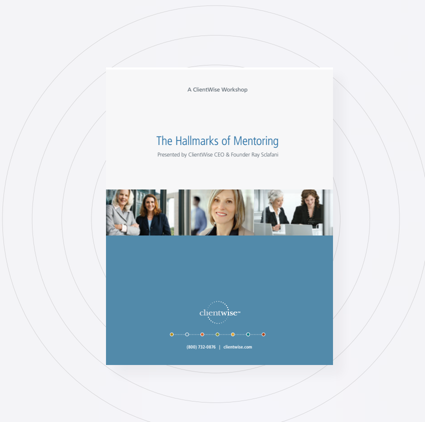
Emotional Intelligence is a key differentiator in determining a financial professional's ability to manage relationships with clients, key advocates, and centers of influence. Created in partnership with Genos International, the *7 Skills Of Emotional Intelligence™* focuses on the skills necessary to build and measure emotional intelligence in order to develop talent and determine how well an individual will perform with others in a given environment.

Building Loyal Client Advocates™

Building Loyal Client Advocates™ is a step-by-step program to make your most loyal clients powerful tools in growing your business. It takes you through the process of discovering your clients in new and comprehensive ways using The ClientWise Conversation™, and helps determine your greatest potential sources for referrals. It outlines tracking tips to keep everything streamlined and organized, and develops a careful process around the very personal practice of generating referrals.

The Professional Advocate Approach™

The Professional Advocate Approach™ is a step-by-step program for maximizing your proprietary process and turning your professional relationships into powerful client acquisition tools. It incorporates The ClientWise Conversation™ and other unique approaches that generate exceptional results with both your clients and professional partners.



The Hallmarks Of Mentoring™

The Hallmarks Of Mentoring™ looks at the mentoring process and relationship as it applies to both mentor and mentee. Giving equal attention to each role, it clearly outlines the necessary attributes for success, and differentiates the mentoring process from that of coaching or advising. This program is intended to help advisors determine the best approach for a given situation and set of goals, and how to effectively implement the mentoring process to achieve those.

Partnering To Create Powerful Coaching Conversations™

Coaching is a widely accepted powerful practice used in a variety of professional industries to develop high potential employees, create a sounding board for executives, and address behavior that might be derailing a process or keeping people from performing at their peak. *Partnering to Create Powerful Coaching Conversations™* is a program created to develop leaders as coaches and bring the effectiveness of powerful coaching conversations directly to their employees and those they manage.

CLIENTWISE
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To learn more about customized presentations and speaking engagements for your firm, please call 800.732.0876

Contact ClientWise

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- Curriculum Design and Program Development
- Presentation Delivery and Workshop Facilitation
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- Broker Dealer & Registered Investment Advisors
- Asset-Management and Insurance Companies

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