CLIENTWISE CAPABILITIES

Professional Coaching Solutions

Financial Advisor Business Coaching

Business Leadership and Executive Development

Group Workshop Coaching

Professional Development for Coaches

Proprietary Research and Content

The ClientWise Speakers Bureau

Resources, Tools and Assessments

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**.™

Partnering with ClientWise

Creating Sustainable Business Results

As the gold standard in business and leadership coaching and consulting for financial professionals, ClientWise is committed to partnering with you to create sustainable business results. Through our Coaching Solutions, Proprietary Research & Content, Workshop Coaching, Keynotes & Presentations, and Resources, Tools & Assessments, our mission is to enable financial professionals to become more resourceful problem solvers, more adept practice managers, and owners of incredibly successful, self-sustaining businesses. In turn, they bring these sustainable skills to benefit their clients, their institutions, and ultimately the industry overall.

Our ability to provide sound industry knowledge through the powerful lens of a coaching partnership is unmatched, and this combination solidifies the ClientWise advantage.

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Professional Coaching Solutions

ClientWise Coaching Solutions combine sound industry knowledge with the powerful impact of a coaching partnership to offer financial professionals customized opportunities for growth. Each coaching program is distinctively tailored to match the professionals' objectives, through services ranging from individual and team coaching, workshop facilitation, team facilitation, and coaching skills training.

Highest Credentialed ICF Coaches:

As members of the International Coaching Federation (ICF) our coaches are credentialed at the highest levels of Professional Certified Coach (PCC) and Master Certified Coach (MCC) and adhere to a strict code of ethics and commit to coaching as a joint partnership. Their extensive work with over 1,500 top industry performers and our ClientWise team of researchers, allows them unique access to the challenges and opportunities faced by financial professionals.

The ClientWise Coaching Partnership:

The ClientWise team personally matches each financial professional with a highly trained ICF Coach based on his or her individual goals and preferences. Through a three-step process, the coach and the financial professional come to a powerful coaching agreement in which financial professionals play an active role in establishing their coaching objectives and applying these in their practice through frequent check-ins and quarterly progress reviews. Financial professionals get results for their business, learn to replicate these results on their own, and improve their communication with staff, clients, and centers of influence by sustaining the model established by their coaching partnership.

The Coaching Blueprint for Corporate Clients:

Our coaching blueprint was created specifically for our corporate clients who wish to rollout a firm wide coaching program for select financial professionals. Our unique and customized approach outlines our repeatedly proven method of success, demonstrates our effective style of partnering to achieve corporate objectives, and is tailored extensively based on the stated outcomes and purpose of the firm. The scalable and repeatable approach created by The Coaching Blueprint™ allows us to get an accurate measurement of progress and success, yet remain flexible enough to cater to the needs of the individual advisors and the corporate culture in which they operate.

The ClientWise Coaching Partnership Process™
Get **Clear.** Get **Focused.** Get **Results.**

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 and Measurable Coaching Objectives with your ClientWise 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

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Financial Advisory Business Coaching

ClientWise has several coaching programs individually tailored to a financial advisor or advisory team's personal needs and objectives. Financial professionals work with our Director of Coaching Services in choosing and partnering with a coach from our team of Professional Certified and Master Certified ICF credentialed coaches. Each program also provides complete access to our proprietary research, resources, and content, including our ClientWise Benchmark Assessment Report (BAR)™, our monthly Success Forums,™ our weekly tips and tools, and our coaching organizer.

COMPLETELY CUSTOMIZED: Our coaching programs provide suggested durations and number of sessions for each coaching program, but all are completely customizable based on each individual client's need, schedule, and desired coaching goal.

Solopreneur

- Typical engagement: 18 coaching sessions within 6-9 months
- Includes access to our Practice Management Content eLibrary,™ which contains original content created from in-depth industry research

Advisory Teams & Ensembles

- Typical engagement: 24 coaching sessions within 12 months
- Individually customized for each ensemble
- Includes access to our Practice Management Content eLibrary™, which contains original content created from in-depth industry research

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Professional Staff

Non FA members of a team

➜ The responsibility and uncertainty of outsourcing professional responsibilities such as marketing, writing, and design to others can sometimes feel more difficult than managing it alone. Based on the particular goals for a practice, we'll ensure that professional staff is supported and achieving the results you and your team have outlined.

Advisory Firms

- ➜ Individually customized for each firm
- ➜ Duration and number of coaching sessions varies based on need
- ➜ Includes access to our Practice Management Content eLibrary™, which contains original content created from in-depth industry research

Executive Leadership and Development

➜ The skills needed to successfully manage and lead a team are different from what advisors use day-to-day, and a leader's ability to step into this role can hugely impact the practice. Through our customized individual coaching programs, as well as workshops dedicated to these particular skills, ClientWise offers coaching programs tailored to the particular needs, goals, and desired outcomes for executives or leaders responsible for leading a wealth advisory team or firm.

Diversity Coaching

➜ With our breadth of industry experience, ClientWise has been, since its inception, committed to supporting diversity and success within the financial services industry. For the individual advisor or leader who is a member of a diverse population, it means having a coach who is completely committed to their success, who also understands the extra challenges these individuals face. Our coaching of diverse financial professionals focuses on helping with individual presence and influence, overcoming barriers, establishing strong workplace and client relationships, and understanding how the strengths of a particular culture or orientation can be used as a valuable tool in creating and sustaining success. Our coaching results in more engaged financial advisors, a greater pool of diverse leadership candidates, greater retention of diverse employees, and a broader ability to serve the needs of diverse communities of clients.

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Business Leadership and Executive Development

ClientWise provides extensive opportunities for financial professionals in executive and leadership positions, including those who lead advisors in a CEO or branch manager role. Coaching is a widely accepted powerful practice used in a variety of professional industries to develop high potential employees by creating a sounding board for executives and leaders, and addressing behaviors that might be derailing a process or keeping people from performing at their peak. We use a variety of tools, exercises and programs to help expedite this process for the financial services leaders, including the selection below:

The ClientWise 90 Day Professional Planner for Leadership Executives™: This program includes a series of exercises to help the financial services leader determine the best course of action for himself/herself based on quarterly goals, and how that relates to the journey of those who report to him/her, and the success of the business overall.

Partnering to Create Powerful Coaching Conversations™: This program was created to develop leaders as coaches and bring the effectiveness of powerful coaching conversations directly to their employees and those they manage.

The Outcome Frame™: This tool is comprised of a series of questions that start with desired goals and works backwards to determine the best approach to achieve those goals based on a leader's unique business situation.

The ClientWise Leadership Self-Assessment™: This exercise takes the financial professional through the process of evaluating himself/herself through the lens of his leadership role. It outlines various types of leadership and examples of each to create commitments around these moving forward.

Lone Ranger to Leader™: This is a four-part program, given over the course of a year, in which a financial professional is taken through the key transitions required to become a masterful team leader. These shifts include both the personal attitudinal shifts necessary to become a true team leader, as well as the action-oriented shifts needed to build a strong team.

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Group Workshop Coaching

Taken separately or in conjunction with ClientWise Coaching programs, our group workshop coaching programs offer in-depth insights on a variety of subjects. In addition to our proprietary content, the workshops provide access to extensive and continuous learning opportunities within a select community of top-performing financial professionals. Our group workshop coaching provides access to:

- → The ClientWise eXchange™ Community, which serves as a forum to exchange best practices and engage in peer-to-peer learning with other highly successful advisors.

- → Specific focus on the financial services industry, which allows us to tailor our approach and apply extensive industry knowledge that caters to the needs of financial advisors, as opposed to workshops generalized across several professions.

- → Highly trained coaches who remain steadfast in their commitment to co-creating and co-learning, even in the face of challenging business decisions.

- → Insights on a variety of topics such as client acquisition, team development, marketing, building loyal client advocates and building a robust network of other professional advocates.

If you have 20-50 advisors who are interested in participating in a workshop that is sure to significantly increase their productivity and growth, we will customize a workshop specifically for your group.

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The ClientWise Business Builders Workshop™

The ClientWise Business Builders Workshop™ is an innovative quarterly workshop designed exclusively for today's top-performing financial professionals looking to create structures and repeatable processes around client acquisition, revenue building, and client relationship development, through strategic skill building and practice management. The workshop contains relevant materials, exercises, and tools and resources that immediately benefit an advisory business. Our focused, action-packed agenda includes:

A year-long investment of four (4) quarterly workshops facilitated by a ClientWise Workshop Coach.

Techniques and solutions to potentially increase productivity by 25% or more over the next year, and double it in three.

A Benchmark Assessment Report (BAR)™ that compares a practice to top-performing advisors, uncovering specific tactics to achieve individual goals.

An analysis of the BAR™, with a customized 45-50 page report detailing how to apply the BAR™ results to improving an individuals' practice management.

An executive summary and coaching guidebook to use as a roadmap for improving business success.

The ClientWise eXchange™ Community, which serves as a forum to exchange best practices and engage in peer-to-peer learning with other highly successful advisors.

Valuable insights into topics requested most by top-performing financial advisors today.

Industry expertise, developed over decades, that allows us to draw on the best in the business and provide clarity around a constantly evolving industry.

The ClientWise Professional Advisory Model™ outlines the seven areas our research indicates are required to build a multi-million dollar wealth advisory business.

A 90-Day Professional Planner™ to stay focused and maintain accountability toward achieving goals month-to-month.

Customized and proprietary content relating to team building, client acquisition, professional advocates, loyal client advocates, and more, as highlighted on the next page.

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Sample Content

Take the first steps toward creating your customized action plan for a successful and sustainable business, by visiting our Business Builders workshop page at:
clientwise.com/the-business-builders

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The Leader's Journey: Ten Key Transitions From Lone Range to Leader™

Our Lone Ranger to Leader™ program helps advisors in leadership roles build and lead high-performing teams that are remarkably cohesive, innately successful, and dedicated to serving their clients.

- ➔ Contains 16 hours of proprietary ClientWise content divided into 4 quarterly workshops:
  - Becoming CEO of a Team
  - Building a Strong Team
  - Creating a Cohesive Team
  - Coaching a High Performing Team
- ➔ Participants are guided through Ten Key Leadership Transitions broken down into leadership behaviors and learning objectives.
- ➔ Each team's progress is measured over the course of the year through the initial Leader's Journey Assessment™ and targeted exercises during and between workshops.

Learn more about this informative and transformational four-part series at:
clientwise.com/loneranger

Development for Coaches

The financial services industry is becoming increasingly aware of the limitless value in hiring and engaging highly trained, professional coaches. While ClientWise maintains a growing team of top credentialed ICF coaches, we also provide development for coaches outside of our network, who need CE credit, higher certification, or who simply want to improve their skills and increase success for themselves, their teams, and their professional environments.

The Certified Financial Services Coach Training Program™

ClientWise created a unique coaching skills training program tailored to the financial professional. Using the same tactics our coaches use in their sessions with clients, it helps financial advisors and financial leaders harness powerful communication tools that enhance their management skills with their teams and their relationships with clients and centers of influence.

An in-depth, 60-hour long coaching training curriculum developed for financial professionals committed to becoming effective communicators and successful relationship managers. The program includes:

- The same tactics ClientWise coaches use with financial professionals, which are built around the International Coaching Federation's (ICF) core coaching competencies, and used to enhance financial professionals' relationships with teams, clients, and centers of influence.
- ClientWise Crucial Coaching Concepts, which cover the central aspects of active listening, relationship building, establishing agreements, exploring issues, creating solutions, and integrating change, among others.
- Progress toward an Associate Certified Coach (ACC) credential with the International Coach Federation (ICF).
- Powerful communication tools including: being completely present, practicing active listening, asking powerful questions, and partnering with others to solve problems.

In today's industry, harnessing these skills is as important as the technical abilities a financial professional brings to the table.

> **Grow your business by enhancing your relationships and communication skills. Learn more about our Certified Financial Services Coach Training Program by visiting: clientwise.com/coaching-skills-program**

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ICF Continuing Coach Education (CCE) Credit

Our Continuing Coach Education Credit is based on the ICF Training and is divided into three categories: Core Competencies, Resource Development and Mentor Coaching.

Core Competencies

Advanced coach training, writing, or research directly related to the ICF Core Competencies, which include: setting the foundation, co-creating the relationship, communicating effectively, and facilitating learning and results.

Resource Development

Training, writing, research, or self-study outside of the ICF Core Competencies that contributes to the professional development of a coach.

Mentor Coaching

Required by the International Coaching Federation, mentor coaching is a necessary practice for coaches looking to tune-up their coaching skills and remain engaged at the highest level with their own coaching clients.

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Proprietary Research & Content

We continually listen to and tap into these resources to generate the best practice management content to fuel improvement for financial advisory businesses. Our coaching partnerships with thousands of high-performing financial professionals, the data from our Benchmark Assessment Reports (BAR)™, our Coach Insights Database™, and our ClientWise Community Feedback provide a front-row seat to the trends and influences shaping the financial services industry today.

This content is available in a variety of formats and accessible to advisors through the following channels based on the individual preference or circumstance of each:

Our proprietary research and content is industry-leading and available for licensing and publishing within your marketing material or on your website.

ClientWise eXchange™

The first peer-to-peer learning platform for financial professionals to collaborate and discuss best practices around industry trends and practice management.

ClientWise e-Library™

Our proprietary ClientWise e-Library™ provides 24/7, on demand access to the best practices and most significant financial trends and influences worldwide

ClientWise Blog

The ClientWise blog is regularly updated by our team and guest contributors

Weekly Tips

Weekly tips and tools, which are provided on a specified basis depending on an advisors' involvement with ClientWise

Monthly Newsletter

Monthly newsletters informing readers about occurrences at ClientWise and industry trends and changes, with access to our latest freemiums

Whitepapers and Reports

Whitepapers and reports based on in-depth research and analysis by the ClientWise team

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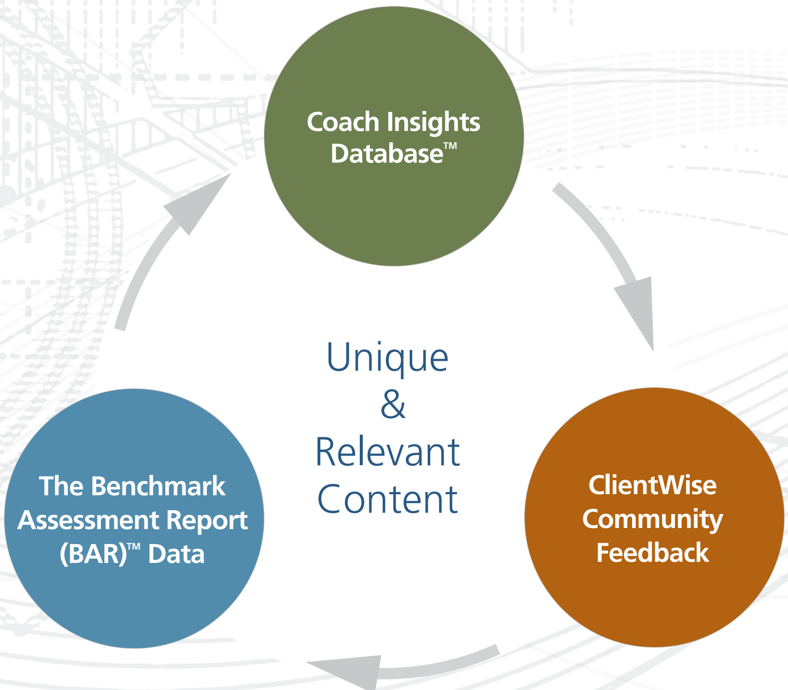
The ClientWise Research Approach™

The ClientWise Research Approach™ fuels our speaking programs and simultaneously provides new learning in and 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.



Our unique, relevant, and proprietary content is generated by The ClientWise Research Approach™

Coach Insights Database™

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.

- ➜ Provide ClientWise real-time insight into what financial professionals encounter on a daily basis, while remaining completely confidential.
- ➜ Highlight key trends and concerns for financial professionals.
- ➜ Guide our approach in both one-on-one and workshop coaching.
- ➜ Ensure 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 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 on the 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 this highest caliber to uncover specific tactics and help financial practices achieve targeted goals.
- ➜ The analysis generated from the BAR™ includes a customized 45-50 page written report detailing each individual or team assessment.
- ➜ These reports confidentially inform our speaking and workshop material.

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The ClientWise Professional Advisory Model (PAM)™

All of the ClientWise proprietary programs are developed for financial advisors based on our Professional Advisory Model (PAM)™ which is compiled from data from interviews with thousands of financial advisors, teams, and Registered Investment Advisors with a minimum of 10 years of service, more than $250 million in assets under management, and more than $3 million in client revenue per year. The PAM™ breaks down a financial advisory practice into seven key categories, providing a roadmap for business management and growth, as well as a roadmap for workshop content.

We want to make our proprietary content as seamlessly accessible and applicable to your practice as possible. We will work with you to develop a customized Professional Advisory Model™ that adheres to your current business structure.

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Organizing Priorities: Organizing and managing priorities is a necessity for every top-performing financial advisory practice. ClientWise helps advisors determine their organizational goals and priorities across the entire PAM™, and create an accountability schedule to adhere to them.

Client Engagement Model™: Client engagement is part of your role as a financial advisor and, at its highest level, client engagement develops Loyal Client Advocates™. The best advisors in the business have a steady stream of introductions coming from a select group of clients with whom they commit to regularly engaging. This ultimately benefits their clients and their business.

Client Acquisition Strategy™: Top-advisors understand the value of a written, coherent client acquisition strategy. This should include: opportunity management, pipeline management, lead generation, lead conversion, and lead qualification, and should be referred to consistently so as to never miss a potential opportunity.

Marketing Approach: A strong marketing strategy drives client acquisition. Building a brand, defining key services, and ensuring coordination of all marketing touch points—to include client segmentation, digital marketing, marketing communications, public relations and advertising—builds a financial advisory practice that generates increasingly qualified leads with increased potential for client satisfaction.

Team Development: A financial advisory practice is only as successful as its team. Advisors who understand the power of common-intent and continually strive to set team goals and well-defined roles and responsibilities within these, are better prepared for future success than the highest performing soloprenuer. A well-developed team provides additional strength, balance, accountability and success.

Professional Advocate Network™: A successful advisor is required to work with professionals in other areas of financial services or periphery centers of influence to best serve clients. The ClientWise proprietary Professional Advocate Approach™ defines approaches to nurture these relationships and manage them to the benefit of both parties, resulting in far more meaningful advocate relationships for both advisor and client.

Business & Operations Management: Successfully managing operations is a top priority for advisors who want to scale their businesses and build a sustainable wealth management practice. Hiring operational talent and streamlining processes allows for faster growth, more opportunity, and higher quality of life both in the office and at home.

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ClientWise Speakers Bureau

Our Speakers Bureau contains some of the highest accredited International Coaching Federation (ICF) coaches, 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.

Keynotes & Presentations

Hire a ClientWise Coach for your next conference. Our coaches are available to present a variety of topics related to thought leadership and key learnings within the industry.

Our keynotes and presentations are singular experiences designed to stimulate new thinking and learning within the financial services industry. Inspired by some of the most powerful thought leadership and key influencers in the industry today, these are delivered by our coaches and geared toward financial professionals seeking sustainable skills to benefit their clients, their businesses, their institutions, and ultimately the industry overall.

Many of our clients currently working one-on-one with ClientWise coaches have seen significant accelerated success in their coaching partnerships as a result of attending these presentations in tandem with their regular coaching sessions.

Our programs are provided in a variety of formats, such as quickstarts, keynotes, workshops and retreats, and include but are not limited to the following topics:

Organizing Priorities

Client Engagement Model™

Client Acquisition Strategy™

Marketing Approach

Team Development

Professional Advocate Network™

Business & Operations Management

Coaching Skills

For more information and a detailed list of topics and speakers' bios, visit:
clientwise.com/speakersbureau/

Additional Resources, Tools & Assessments

The following tools and assessments are available to financial professionals and teams alike, and can be used on their own or in conjunction with other services listed in this brochure.

The ClientWise Benchmark Assessment Report (BAR)™

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

- ➔ The BAR™ measures a practice against top performing advisors to compare to the highest caliber and uncover specific tactics to achieve goals.
- ➔ The analysis generated from the BAR™ includes a customized 45-50 page written report detailing each individual's assessment.

We want to make our proprietary content as seamlessly accessible and applicable to your practice as possible. We will work with you to develop a customized Benchmark Assessment Report™ that adheres to your current business.

For additional information, or to sign up to learn more about receiving a custom Benchmark Assessment Report™ evaluating your business against the industry's best, visit:
clientwise.com/benchmark

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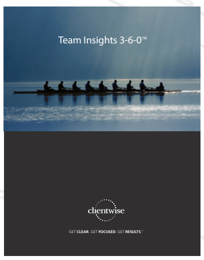
The ClientWise eXchange™

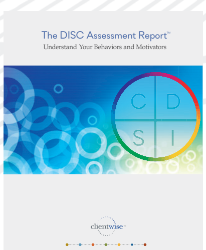
The ClientWise eXchange™ is the first virtual learning platform and peer-to-peer exchange within the financial services industry. Advisors on the eXchange™ have access to publicly and privately facilitated forums and communities led by International Coach Federation (ICF) credentialed coaches, a robust eLibrary™ of top-notch practice management resources, industry research and thought leadership, and virtual teaching sessions to facilitate the growth and development of their businesses.

Team Insights 3-6-0™



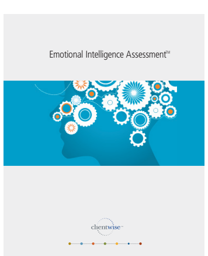
Powered by ClientWise research, our Team Insights 3-6-0™ takes a 360 degree approach to provide a complete picture of the team environment, through complete and confidential employee engagement, to help define and develop strategies for growth and sustainable business practices. Each team member has an equal voice in helping to shape team communication, structure and strategy by contributing to the custom report ClientWise prepares for the team. The report is presented at a team offsite meeting and the group works collaboratively to outline areas for change and improvement and prioritizes possible coaching objectives and areas for immediate focus. **www.clientwise.com/team360**

DISC Assessment™



DISC Assessment™ is an evaluation that provides insight into natural and adaptable behavior styles for individuals and teams. By assessing traits of dominance, influence, steadiness, and compliance, it creates clearer goals around leadership, management, sales, hiring, and employee development.
www.clientwise.com/disc

Emotional Intelligence Assessment™



Emotional Intelligence is a key differentiator in determining an advisor or team member's ability to manage relationships with clients, key advocates, and centers of influence. Our proprietary tools measure this seemingly intangible quality to determine how well an individual will perform with others in a given environment. **www.clientwise.com/ei**

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In Conclusion

Content alone, delivered en masse, will not help financial professionals achieve the level of success they desire. Nor will content alone increase the productivity of a given firm or the financial services industry on the whole. Proof of this lies in a marketplace laden with content that is accessible to all financial professionals, the majority of whom continually fall short of their goals.

Instead, it is the unique axis at which great content meets a powerful coaching partnership that success is achieved. And it is from here that our founder, Ray Sclafani, launched ClientWise. Ray's understanding of advisor behavior, especially as related to the acquisition programs he created at AllianceBernstein, motivated him to launch ClientWise in 2006, and develop the distinctive relationship between coaching and content that is now a ClientWise signature.

Our clients' success stories continue to prove that strong content supported by our scalable ClientWise coaching programs achieves far better and more sustainable business results than content alone.

We invite you to learn more about how we partner with financial professionals to help our clients get clear, get focused, and get better business results.

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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

Connect with ClientWise

Speak with us directly:

(800) 732-0876

Check out our website:

clientwise.com

Browse our community:

eXchange.clientwise.com

Read our blog:

clientwise.com/blog

Join us on LinkedIn:

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