INCREASE PROFITS. MAXIMIZE ENTERPRISE VALUE.

BUSINESS BUILDERS ACADEMY™

clientwise™

GET CLEAR. GET FOCUSED. GET RESULTS.™

IT IS NOT THE STRONGEST OR THE MOST INTELLIGENT WHO WILL SURVIVE, BUT THOSE WHO CAN BEST MANAGE CHANGE.

Charles Darwin

You've worked incredibly hard to build a successful business—evolving and adapting to changing markets, ever-shifting regulatory requirements and increasing client demands.

You're proud of the team you've assembled, the service model you've implemented and the fiduciary care you take in managing your clients' wealth.

Most advisors would consider what they've accomplished and smile, taking their foot off the pedal to settle back and enjoy the fruits of their labor; relying on slow and steady incremental future growth to sustain their practice.

But you're not most advisors, are you?

MAXIMIZE YOUR ENTERPRISE VALUE

We designed the ClientWise Business Builders Academy (BBA)™ precisely for select advisors like you who envision more for their firms; hands-on business owners who crave meaningful growth and are deeply committed to maximizing the long-term value of their enterprise—not just for their own ends, but for the benefit of their teams, their clients, their centers of influence and future generations.

THIS PROFESSIONAL COACHING PROGRAM IS SPECIFICALLY DESIGNED TO HELP YOU NAVIGATE THE UNIQUE CHALLENGES ASSOCIATED WITH GROWING A PROFITABLE AND SUSTAINABLE BUSINESS CAPABLE OF SERVING GENERATIONS OF CLIENTS FOR YEARS TO COME.

- ➜ What's the optimal way to build a truly interdependent team?
- ➜ How can we evolve from a wealth management business to a human capital business that delivers wealth management?
- ➜ What steps do I need to take to transition from a lone ranger to a leader?
- ➜ How do I go about institutionalizing and operationalizing sales and marketing and other processes?
- ➜ What strategies will most impact my enterprise value and facilitate a future succession?

These are just some of the critical growth issues the first-of-its-kind Business Builders Academy™ program will help you and your team address, regardless of what stage of the business lifecycle your practice is in.

THE BUSINESS BUILDERS ACADEMY™ MISSION

OUR MISSION IS A SIMPLE ONE: TO ENGAGE WITH THOSE ADVISORS WHO ARE GENUINELY DEDICATED TO SERVING FAMILIES FOR GENERATIONS, COMMITTED TO INVESTING IN HUMAN CAPITAL AND BUILDING TRUE TEAMS, AND FOCUSED ON STRATEGICALLY PLANNING THEIR EXIT AND MAXIMIZING ENTERPRISE VALUE.

Upon acceptance into the Business Builders Academy,™ you will join a community of lifelong learners, all committed to growing revenue, increasing profitability, building teams, and maximizing enterprise value.

Members are grouped into one of three levels (Emerging Leaders, Master Leaders or Enterprise Leaders) and meet quarterly to participate in collaborative workshops. The well-researched curriculum is customized to the advisors' specific challenges and is led by ClientWise professionals. As your business grows, you'll have the opportunity to move up to the next learning path as you meet the growth criteria.

The program's quarterly workshops and ClientWise eXchange™ tools, resources and interactive community all work together to encourage shared insights, enable self-directed learning, hone strategic thinking and most importantly, deliver sustainable results.

Working together, we'll empower you to unlock your firm's potential, drive revenue and profit, and maximize your enterprise value.

BUSINESS BUILDERS ACADEMY™

Emerging Leader practices can vary in size, but often look like:

$250-$650K gross revenue
5+ years in the business
1-3 team members*

** These numbers are approximations*

Core Concepts For Emerging Leaders:

Emerging Leaders Core Concepts™	1 You've Been Framed!™	2 Client Care for Sustainable Results™
3 Systemization and Process Implementation	4 Optimizing Business Financials	5 Framing the Future™
6 Professional Advisory Model™	7 Business Development and Growth	8 Building Advocacy

EMERGING LEADERS PROGRAM

Emerging Leaders share an entrepreneurial spirit and a commitment to improving both growth and efficiency, as well as reinvesting in their business. Often, these advisors have a particular focus on expanding services to provide a more holistic wealth management offering, along with team growth and development challenges. They have a vision of being the CEO of an enterprise and a desire to build interdependent teams, but need the guidance to get there. And above all, they are coachable, collaborative, self-aware, driven, and willing to be vulnerable.

Our Emerging Leader workshops address foundational practice management concepts. Each quarter, advisors focus on goals and key learning objectives based on these concepts. Together with the workshop facilitator, the advisors will identify immediate actions to take to improve proficiency in each area. For example, areas of focus include:

→ **Value statement and capabilities deck development**

→ **Wealth management business branding and framing**

→ **Approaches to building loyal client advocates**

→ **Methods for segmenting your client base**

→ **Create and implement a 3-year strategic business plan**

→ **Team member evaluation and next-hire planning**

→ **Evaluate business financials and revenue trigger points**

→ **Proper visioning of your future business and future team**

MASTER LEADERS PROGRAM

While Master Leaders have successfully built holistic wealth management businesses, they often still operate very much like lone rangers. Both day-to-day business operations and team dynamics tend to rely too heavily on them as leaders. Typically, these leaders are looking for help transitioning into a new role as CEO and developing more self-sufficient and interdependent teams with strong synergies. They also have begun to realize the importance of implementing a viable succession plan.

Our Master Leader workshops help members build sustainable enterprise value while seamlessly shifting from running working groups to leading interdependent teams. Each quarter, advisors focus on goals and key learning objectives based on these concepts. Together with the workshop facilitator, the advisors will identify immediate actions to take to improve proficiency in each area. For example, areas of focus include:

- **Deepening client advocacy and professional network advocacy**
- **Methods for giving feedback and advice from a collaborative perspective**
- **Efficient time management and activity management for senior lead advisors**
- **Strategies for assessing talent and identifying team gaps**
- **Activities and tools for leadership and professional development (for advisors and teams)**
- **Methods for properly framing future outcomes**
- **Necessary steps for business succession planning**

Master Leader practices can vary in size, but often look like:

$650K - $2M gross revenue
10+ years in the business
3+ team members*

** These numbers are approximations*

Core Concepts For Master Leaders:

Master Leaders Core Concepts™	1 You've Been Framed!™	2 Client Care
3 Lone Ranger to Leader™	4 The Professional Advisory Model™	5 Total Team Leadership™
6 Building Advocacy	7 Enterprise Value	8 Maximize Wealth

BUSINESS BUILDERS ACADEMY™

Enterprise Leader practices can vary in size, but often look like:

$2M+ gross revenue
20+ years in the business
7+ team members*

**

** These numbers are approximations*

Core Concepts For Enterprise Leaders:

Enterprise Leaders Core Concepts™	1 The Kaizen Gap Minder™	2 Amplifying Human Capital™
3 The Fully Designed Future™	4 Total Team Leadership™	5 Client Cycle Institutionalized™
6 Professional Advisory Model™	7 The Core Values Culture™	8 Financial Valuation Maximizer™

ENTERPRISE LEADERS PROGRAM

Having successfully built large, robust wealth management enterprises, Enterprise Leaders have turned their focus towards key strategic decision-making such as clarifying their future role in the firm, scaling and creating capacity, ensuring the business' sustainability, and maximizing their enterprise value. Often, they're challenged when it comes to scaling and maximizing talent, skill and potential on their team. And they've begun to carefully think about the legacy they want to leave.

Our Enterprise Leader workshops help members with proper and appropriate strategic decision-making. Each quarter, advisors will focus on goals and key learning objectives based on these concepts. Together with the workshop facilitator, the advisors will identify immediate actions to take to improve proficiency in each area. For example, areas of focus include:

➜ **How to define your personal and business legacy**

➜ **Creating a strong 5-year plan**

➜ **How to co-create professional and development plans for your team**

➜ **How to have successful strategic team meetings**

➜ **Creating a specialized multi-generational service plan for clients**

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

ADDITIONAL RESOURCES

The learning continues after the workshop. As a BBA™ member, you'll have access to the ClientWise eXchange™, a first-of-its-kind interactive practice management learning platform that includes:

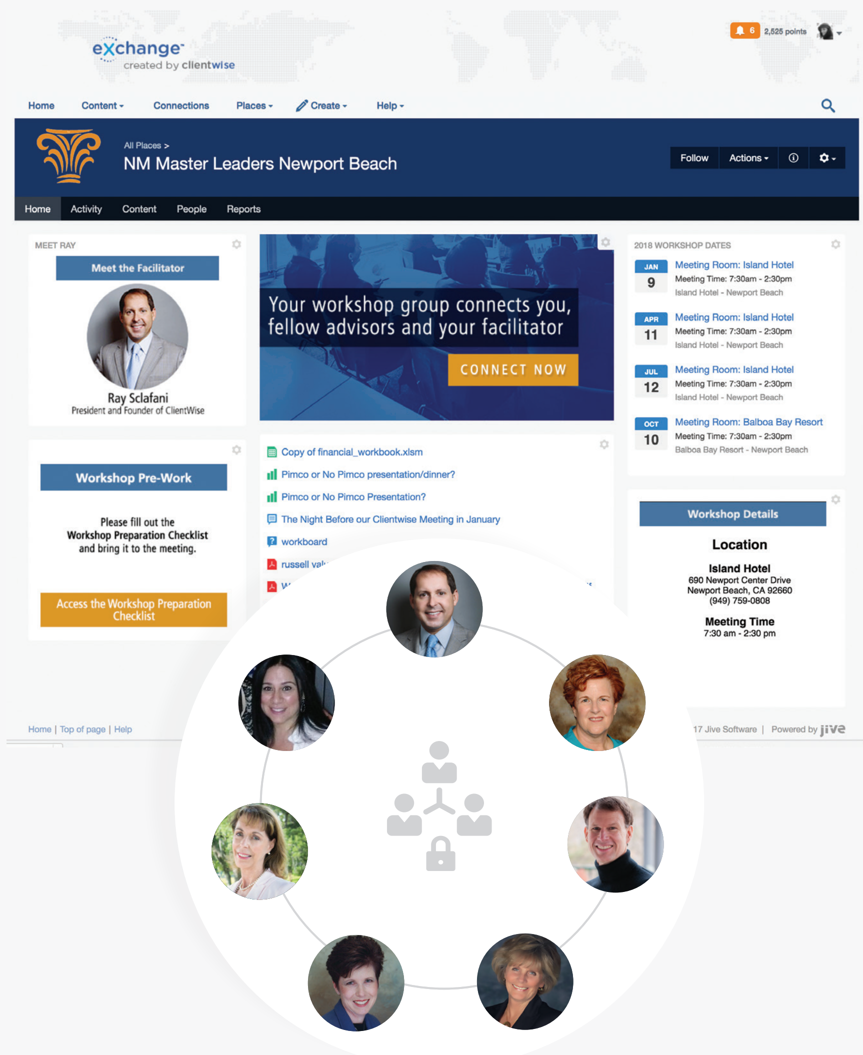
➜ **Proprietary practice management content including guidebooks, tools, articles, and blogs**

➜ **A large and engaged networking community of high-performing financial professionals, and highly credentialed executive coaches**

➜ **Thought leadership from industry practice management, wealth management, and marketing experts**

eXchange™ WORKSHOP GROUPS

Access key information about your workshops, and interact with other members in your group. The group page is a private area on the eXchange™, allowing you and other group members to interact only with each other. Use the space to discuss challenges and best practices, review key workshop learnings, or hold each other accountable to goals and objectives.



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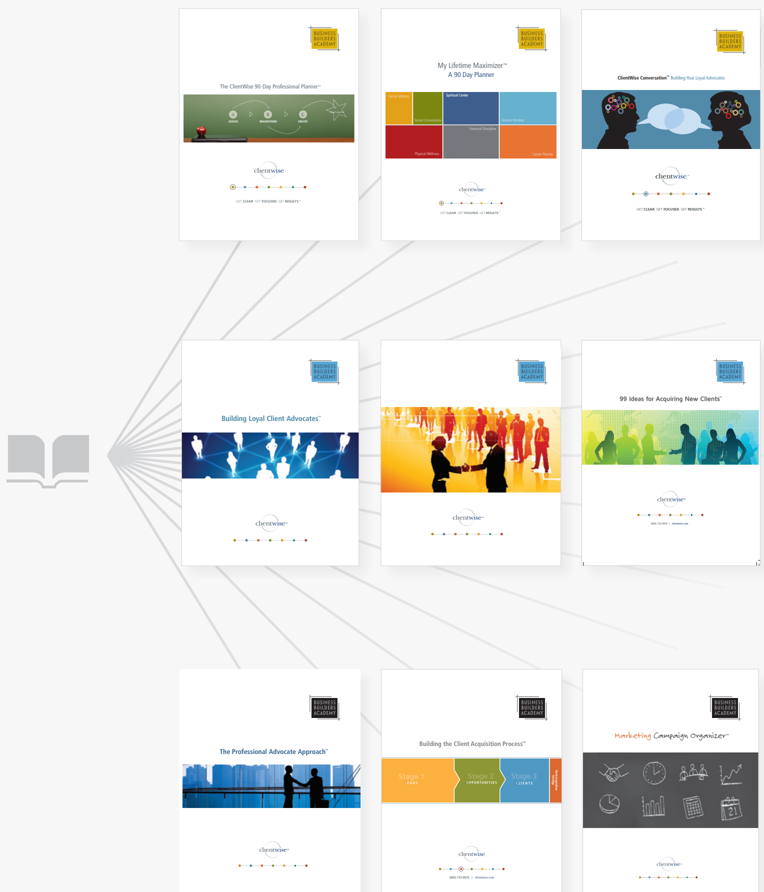
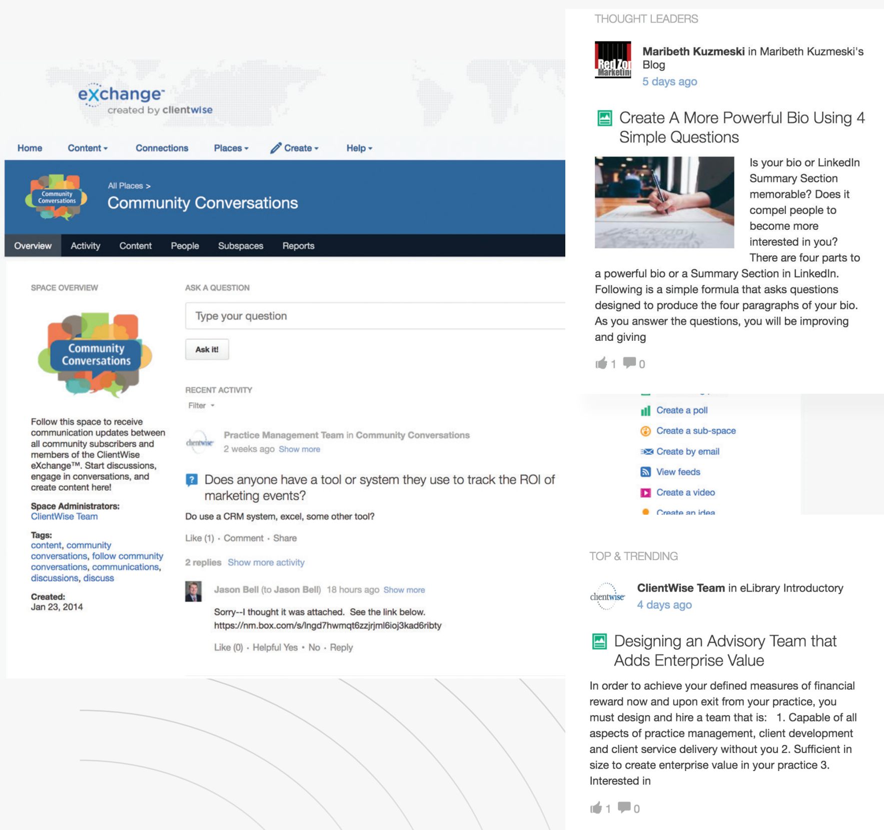
exchange™ CONTENT LIBRARY

Delve deeper into specific topics, access additional tools and worksheets relating to your workshop learnings, or simply peruse sections at your leisure. With hundreds of regularly updated content, delivered in a variety of formats, you and your team can rest assured that you have all the resources at your fingertips to implement key concepts you learned in the workshop.



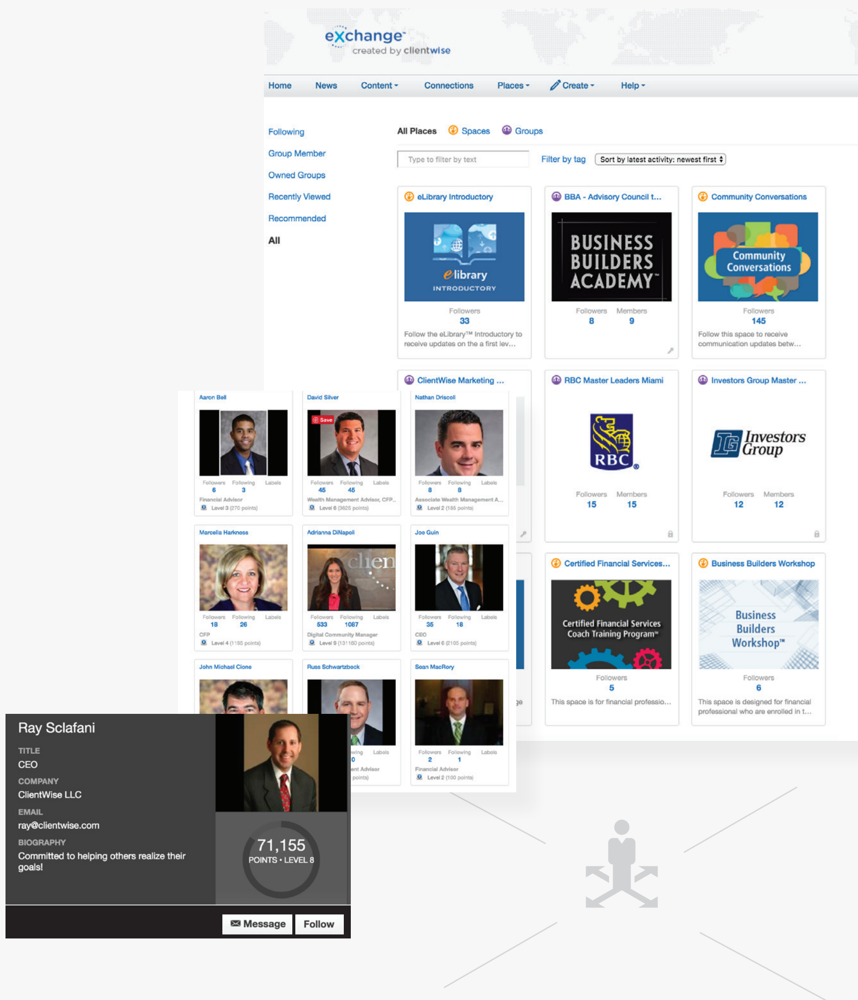
eXchange™ NEWS FEED

With thousands of active eXchange™ members (including advisors from across the country, credentialed business coaches and professional workshop facilitators) you'll have the ability to engage in a dialogue on industry trends, advisory challenges, and all things practice management. Pose a question to our community, share a best practice, or simply stay in touch with our real-time news feed to make the most of this interactive experience.



eXchange™ CUSTOMIZE YOUR EXPERIENCE

The *Follow* or *Join Group* feature lets you plug into the information most relevant to your interests. Follow a specific thought leader's blog, join the monthly practice management webinar series group, or simply bookmark a piece of content or tool that intrigues you. The eXchange™ was designed to give you both freedom and structure—a space to learn and think at your own pace with enough structure to keep you organized and focused on your goals.



TO REGISTER OR LEARN MORE

To learn more about the ClientWise Business Builders Academy™ or additional programs and custom coaching solutions, please visit **academy.clientwise.com.**

IF YOU WANT TO GO FAST, GO ALONE.
IF YOU WANT TO GO FAR, GO TOGETHER.

African Proverb

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BUSINESS BUILDERS ACADEMY™

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

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- Wealth Advisors
- Financial Advisors
- Broker Dealer & Registered Investment Advisors
- Asset-Management and Insurance Companies

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