

1QASM Business Coaching

Helping Advisors Build Great BusinessesTM



WELCOME TO 1QA BUSINESS COACHING

Are you ready to become a top performing Financial Advisor? Are you looking for a clearly defined plan of action? Is it time to drive growth and development in a way that holds you accountable and delivers results? If so, 1QA Business Coaching is for you.

This coaching program combines the experience, best practices, proprietary research and proven tools of practice management innovators Genworth Financial Wealth Management and Quantuvis Consulting, Inc. This uniquely powerful partnership can put your firm on the path to becoming a 1QA.

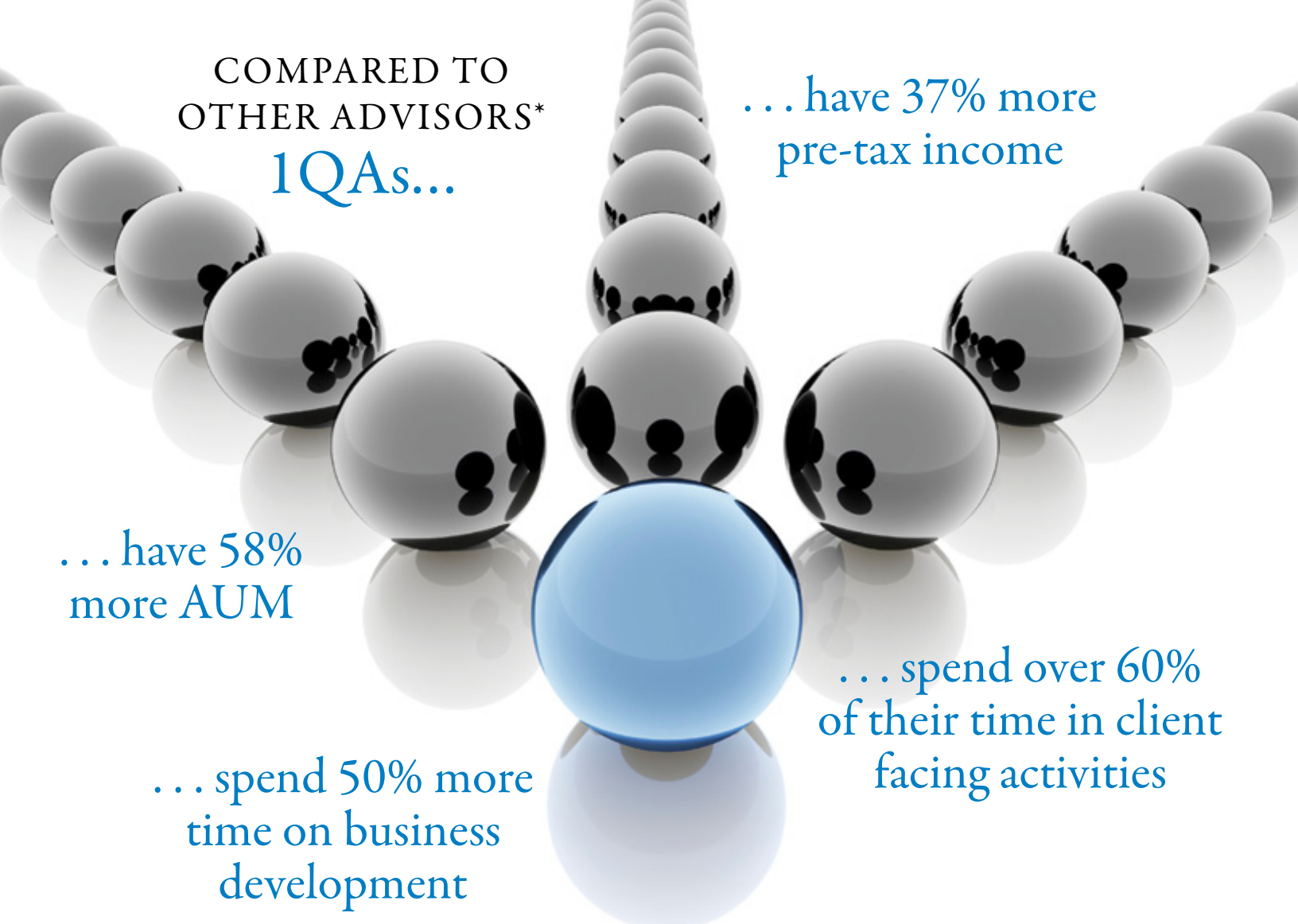
1QA Business Coaching is founded on the principles of *The Seven Essential Disciplines*, introduced in Genworth Financial Wealth Management's industry-recognized Mastery Program®. Through a series of retreats, peer group work, and one-on-one dialogue with a Business Coach, you will explore each of these strategic concepts that are critical to the success of your business. In addition to best practices and coaching support, you receive exclusive access to business tools, modules and libraries to develop customized best practices solutions and systems for implementation within your own business.

1QA Business Coaching offers a genuine partnership based on proven techniques from your most successful peers. Get ready for the next step. Welcome to 1QA Business Coaching.

WHAT IS 1QA?

1QA stands for
"Top-Quartile Advisor" –
the top 25% of advisors,
in owner income
and profits.





COMPARED TO
OTHER ADVISORS*
1QAs...

... have 37% more
pre-tax income

... have 58%
more AUM

... spend 50% more
time on business
development

... spend over 60%
of their time in client
facing activities

ARE YOU READY FOR 1QA BUSINESS COACHING?

This program is not
for everybody. It is
specifically designed
for Advisors that want:

- A clear vision for their business
- To consistently deliver a world-class experience to their clients
- A steady stream of ideal prospects
- More control of their time – personally and professionally
- To leverage technology and systems to improve business performance
- Effective plans to hire, retain and reward talented staff
- An efficient, sustainable, profitable business

If achieving success, increasing income, and more professional and personal satisfaction are what you're looking for...then you're ready for 1QA Business Coaching.

WHAT IS INCLUDED

DISCOVERY

A baseline assessment of your firm's strengths, challenges, and overall objectives

AT START

COACHING RETREATS

Three retreats per year, 1 1/2 days in length, education on best practices strategies and solutions

MAY 13-14 • DALLAS, TX
SEPT 9-10 • BOSTON, MA
JAN 6-7 • PLEASANT HILL, CA

GROUP COACHING CALL

Best practices strategy and implementation review (1 hour)

MONTHLY

ONE-ON-ONE COACHING CALL

Individualized consulting support with Business Coach (1 hour)

MONTHLY

ACCESS TO BUSINESS TOOLS

Access to interactive tools, modules and libraries

ONGOING

1QA BUSINESS COACHING CURRICULUM

Business Planning

1QA Efficient Frontier
Vision, Values, & Goals
Business Architecture
Financial Management
Financial Benchmarking
Building & Realizing Value

1QA Success Principle

Time Management
Reality Checks
Delegating to Support Staff
Firm Communications
Outsourcing Strategies

Business Development

Brand Development
Elevator Pitch
Niche Marketing
Building Strategic Relationships
Marketing Plan
Prospect Process
Mastering Referrals
Client Satisfaction Survey

Staffing Strategy

Staff Development
Hiring & On-boarding
Training Programs

Team Building

Organizational Models
Job Descriptions
Career Ladders
Compensation Plans
Performance Reviews

Client Relationship Management

Client Base Analysis
Client Segmentation
Client Service Plan
Ideal Client Profile

Fee Schedule & Analysis

New Client Process
Annual Review Process

Operations Optimization

Building a Systems-based Business
Systems Management Pyramid
Firm Systems Model
Work Flow Models
Technology Solutions

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