

Mastery Program®

Genworth Financial Wealth Management (GFWM) believes advisors using our platform have made a conscious decision to retain their independence in order to provide their clients the best possible wealth management service. GFWM supports that dedication by providing financial advisors practice management support and helping them build better businesses.



Day 1 – Defining Your Ideal Growth

1:00 pm	Mastery Overview & 1QA Research: Why GFWM is committed to Practice Management; a discussion on the research of top-quartile advisor (1QA) businesses.
2:00 pm	Industry Trends: Examining key drivers of the Financial Advisor industry.
3:00 pm	Business Vision: Setting your sights on becoming a 1QA.
4:00 pm	Business Vision & Goal Setting Workshop
5:00 pm	Meeting Adjourned
6:30 pm	Dinner

Day 2 – Developing a Foundation for Growth

Client Engagement and Experiences

8:00 am	Client Segmentation: Working with the right clients.
9:00 am	Client Satisfaction: Converting clients into promoters.
10:00 am	Staging Client Experiences: Delivering the right service to the right clients.
11:00 am	Wealth Management Roadmap Workshop
12:00 pm	Lunch

Business Management

1:00 pm	Business Systems & Technology: Leveraging tools and processes to build efficiencies in your business.
2:00 pm	Human Capital: Building a high performance team to support your vision.
3:00 pm	Dashboards and Benchmarking: Monitoring how your business is doing against the goals you set, and 1QAs.
4:00 pm	Value Maximization: Building equity in your business.
5:00 pm	Meeting Adjourned (no scheduled activities)

Day 3 – Driving Growth in Your Business

Branding and Marketing

8:00 am	Building Your Personal Brand: Creating the right image for your business in the marketplace.
9:00 am	Marketing Messages & Value Propositions: Developing content for positioning yourself with clients.

Client Acquisition Strategy

10:00 am	Strategic Relationship Building: Aligning your clients and professional associate contacts to grow your firm.
11:00 am	Achieving Your 1QA Milestones: Implementing tactics that attract clients to your business.
12:00 pm	What Happens on Monday?