Logo

LeadershipAdvantage℠

Everyone wants to grow their business.

We can help you.

For financial advisor use only.

ASSETMARK®

AssetMark's Leadership Advantage, provided by [BD Partner], is a practice management program dedicated to helping advisors grow their business and establish a value maximization plan. We believe a disciplined, practical, and actionable approach is needed to take a business to the next level. Leadership Advantage provides the infrastructure, knowledge, tools, and resources to increase efficiencies and improve business value.

Program Overview

The Leadership Advantage Program is customized where you can choose the modules and content that would be most beneficial to your financial advisors. There are three main components to the program:

1 One-Day Practice Management Workshop

The program kicks off with a one day comprehensive practice management workshop. There are four potential focus areas to choose from.

- Access your business and create a strategic plan.
- Conduct a client segmentation analysis and beyond.
- Employ a profitable service model and fee schedule
- Shine with simple, smart marketing and enhanced branding.

2 12 Monthly Implementation Webinars

4 Hands-On Webinars

To further develop the skills and information from the workshop, there are four monthly one-hour webinars to expand on focus areas.

4 Study Group Webinars

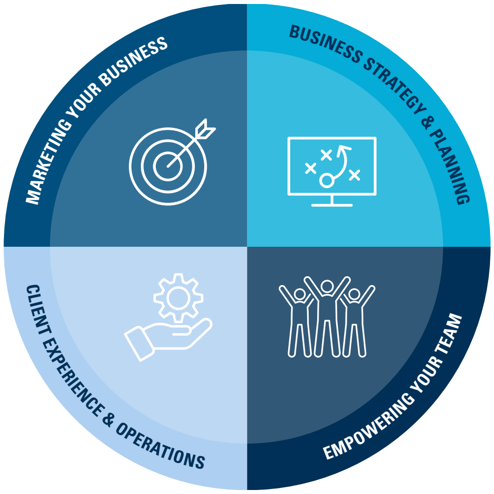
Webinars dedicated as study groups allow participants a convenient way to convene with their peers to share best practices.

4 Platform & Service Webinars

Webinars are focused on how to best leverage the AssetMark platform and explore opportunities available.

3 Consulting Calls with Broker-Dealer Management (For Firm Owners)

Intended for enterprise leaders, each month, we will meet with [BDs] Executive Management Team and influencers to discuss progress and make adjustments as needed to optimize the program.



Business Consulting Model

Our Leadership Advantage consulting model and content seek to help advisor groups focus on the core quadrants over 12 months.

These four essential disciplines constitute a comprehensive, integrated approach to helping advisors build a more satisfying, sustainable, and efficient practice infrastructure.

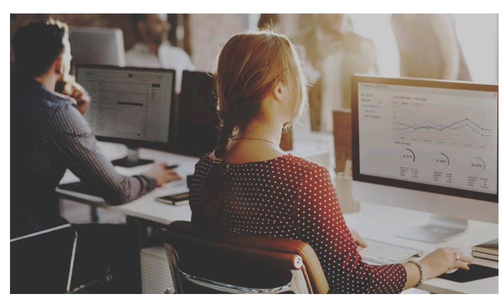
The Benefits

The participants who benefit most from Leadership Advantage are ready to drive business growth and are looking for a clearly defined plan of action for development in an atmosphere of accountability.

While enterprise leaders and independent financial advisors will have slightly different takeaways depending on their roles, many benefits are the same.

Both groups will learn how to:

- Create a clear vision for their business
- Consistently deliver a personalized experience to their clients
- Assess their business and benchmark themselves based on production against their peers
- Develop a strategic business plan that includes key performance indicators for tracking
- Develop a systematized approach to maintaining strategic relationships and referrals
- Gain more control of their time - personally and professionally
- Leverage technology and systems to improve business performance
- Create an efficient, sustainable, profitable business



FAQs

Who are the other advisors participating in the program?

The advisors participating in Leadership Advantage are your peers. Participants are exposed to individuals with varying degrees of experience, knowledge, and skills. We have found that participants appreciate this mix, and we provide a forum where advisors benefit from sharing their own experiences and learning from their peers.

What is the focus of the program?

Leadership Advantage is focused on providing solid practice management and business development tools and solutions designed to improve an organization's overall performance, regardless of its platform or product.

How do I qualify, and what is the cost?

Qualification to participate is based on advisor engagement and desire to work on their business. The cost is the advisor's time and workshop travel expenses.

Hear From Your Peers

"Having a partner in AssetMark that cares enough to support and help cultivate my business

This is my first experience with AssetMark and also the most in depth training for making me more professional and efficient in my 27 years as a RR. Thank you for the opportunity to improve/grow my business in a best practices way.

I feel like the course and the worksheets are like a college course or a new designation on how to run a successful investment practice."

100% of attendees rate Leadership Advantage as a positive experience.*

97% of attendees rate the content & subject matter as very to extremely valuable.*

Questions? Email us at leadershipadvantage@assetmark.com

* Source: AssetMark Leadership Advantage Completion Surveys

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