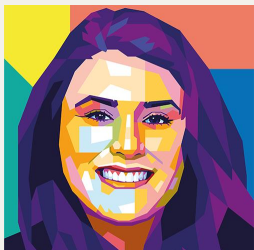


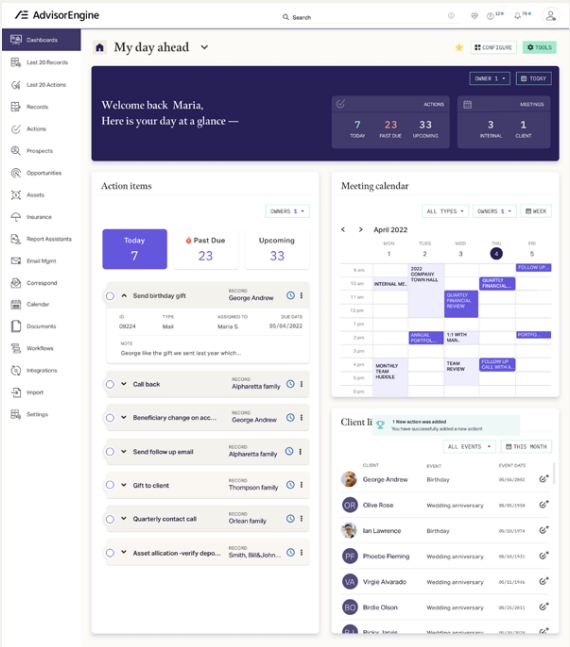
The growth code – three steps to predictable revenue

Our agenda

ACTIONABLE PERSPECTIVE



TECH DEMO



RESOURCES



Presented by



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AdvisorEngine

Your wealth management machine



CRM



PORTFOLIO
MANAGEMENT



DIGITAL
ONBOARDING



CLIENT
PORTAL



BUSINESS
INTELLIGENCE

Presented by



Growth platform for wealth management firms

PROPOSALS

RISK TOLERANCE

COMPLIANCE

PORTFOLIO ANALYTICS

LEAD GEN

EXECUTIVE DASHBOARDS

FINANCIAL PLANNING

ENGAGEMENT

Your host



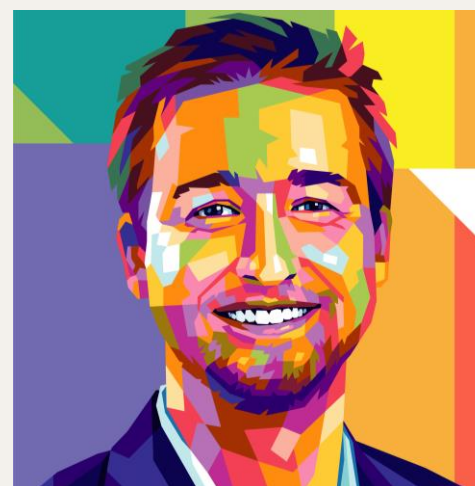
SULEMAN
DIN

Today's experts



KELLY
WALTRICH

intention.ly



DAN
BOLTON

 Nitrogen



NED
DANE

 AdvisorEngine

The three steps to predictable revenue growth

01 Take stock

02 Build a plan

03 Execute

Take stock

Build a plan

Execute

ASK YOURSELF + YOUR TEAM

→ Where are we spending time / resources?

Take stock

Build a plan

Execute

YOUR ACTION ITEMS

- Honestly assess your challenges / blind spots
- Calculate your time spent on client service vs. growth
- Sharpen your growth metrics

Take stock

Build a plan

Execute

ASK YOURSELF + YOUR TEAM

→ What are our target results –
and what activities are needed to achieve them?

Take stock

Build a plan

Execute

YOUR ACTION ITEMS

- Put down an individual owner for each target result
- Lay out your planned activities on a timeline
- Consider any new capabilities/spend required

Take stock

Build a plan

Execute

ASK YOURSELF + YOUR TEAM

→ How do we ensure that we GSD?

Take stock

Build a plan

Execute


YOUR ACTION ITEMS

- Enlist your full company in your growth initiatives
- Calendar your check-in meetings now, for the full year
- Ensure focus existing clients AND new relationships

Technology demo



KATHY
CROWLEY

 AdvisorEngine



MITCH
DUNNE

 Nitrogen

The series continues...

WEDNESDAY,
AUGUST 30
2PM ET

Operational excellence –
tighten up your team's
execution



THURSDAY,
SEPTEMBER 14
2PM ET

A client experience that
builds loyalty – and
referrals



WEDNESDAY,
SEPTEMBER 27
2PM ET

CEO POV: challenges +
opportunities in wealth
management



Forward to your colleagues!