



ADVISOR DEVELOPMENT PROGRAM

A 12-MONTH GROWTH JOURNEY FOR FINANCIAL ADVISORS

Think Strategically. Act Intentionally. Execute Consistently.

VALUES ♦ VOICE ♦ PROSPECTING ♦ PRODUCTIVITY ♦ CLIENT EXPERIENCE ♦
REFERRALS

A guided, cohort-based coaching program that helps financial advisors define their value, build a repeatable growth engine, and design a practice worth referring — one focused monthly session at a time.

WHAT ADVISORS GAIN

- ◆ **Clarity of purpose** — uncover their personal values and craft a confident "what I do" story
- ◆ **A diversified prospecting system** — COIs, networking, social media, and drip marketing that runs on autopilot
- ◆ **Stronger client conversations** — discovery-based meetings that build trust and earn "yes"
- ◆ **A working COI engine** — ranked relationships, a give-first cadence, and real momentum
- ◆ **A distinctive client experience** — a "WOW" standard that makes price irrelevant
- ◆ **The confidence to ask for referrals** — and a system to follow through every time
- ◆ **A personal Model Week** — a repeatable structure that protects time for growth
- ◆ **A forward-looking 12-month plan** — every deliverable consolidated into one roadmap

THE 12-MONTH JOURNEY

Q1 · Foundation

1 Kickoff Session • **2** Your Value Through Your Values • **3** Defining Your Role

Q2 · Growth Engine

4 Hunters vs. Farmers • **5** Diversified Prospecting Strategy • **6** Mastering the Client Conversation

Q3 · Productivity & Brand

7 Centers of Influence Engine • **8** Article Review & My 168 • **9** Driving Productivity

Q4 · Referrals & Vision

10 Brand Through Client Experience • **11** The Art of the Referral • **12** Your 12-Month Plan for Success

12

Monthly live sessions, 60–90 minutes each

1

Peer cohort for accountability & connection

12

Actionable homework assignments

1

Personal plan delivered at graduation

READY TO INVEST IN YOUR NEXT LEVEL?

Seats are limited each cohort — reach out today to enroll or bring this program to your team.

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