



# **ADVISOR TO ADVISORS**

## **BUSINESS CONSULTING & PERSONAL COACHING SERVICES**

### **FOR**

## **PRIVATE WEALTH ADVISORS**

### **MISSION**

We support the growth and development of successful Private Wealth Advisors to continuously grow, improve and transition their businesses, resulting in increased AUM and revenue, improved clientele quality, optimized business practices and realized franchise value.

### **SPECIALTIES**

1. Laser fast creative problem solving, idea generation, collaborative best-thinking.
2. Team development, all phases of new team formation to adding members, succession/exit plans.
3. Strategic referral prospecting within clientele and Centers of Influence, custom approaches.
4. Value proposition/target market focus and articulation; branding materials and planning.
5. Group and individual facilitation and strategic planning.
6. Partner conflict resolution and interpersonal team communication improvement.
7. Consultative sales methods and strategies.

### **DIFFERENTIATORS**

- **Forward-thinking creativity applied to growth strategies to get to the next level.**
- Monthly in-person sessions, complemented with teleconferences and email communication.
- Extensive work with advisory teams of all types.
- The intimate, customized and broad scope of work.
- The personal and motivating nature of our relationships.
- The accountability and advisor execution of their plan.
- Coaching and consulting since 1989.

### **POINTS OF DISTINCTION**

1. We understand the financial services industry and serve multi-million dollar teams/producers.
2. We ask targeted questions before advising and help you achieve what you want to achieve.
3. We show up in person monthly at your office and act as an accountability partner.
4. We are flexible, creative and responsive in meeting your unique needs.
5. We study successful “best practices” in the field and model replicable strategies.
6. We encourage balanced living and link your personal goals into your business plan.
7. We act as a committed partner in supporting you along with your manager and firm.
8. We have a large and wide scope of tools— examples, templates, methods, etc.
9. We love our work and our clients and have extensive references.



## CONSULTING OBJECTIVES - SCOPE OF WORK

1. Provide customized advice, decision support and implementation accountability through a long-term, personal relationship using private, in-person coaching.
2. Facilitate development of your business strategy:
  - Team development/building/acquisition/succession, facilitating candidate selection, roles;
  - Mission, vision, and investment philosophy;
  - Long term and short term goals,
  - Strategies and systems for asset gathering, asset management, value added client services and time/administrative management; action plans and time lines.
3. Review or facilitate completion of customized marketing materials for positioning and marketing your brand of services and facilitating referrals.
4. Use personality assessment tools for personal development and team building.
5. Develop rainmaker skills to achieve peak sales performance.
6. Clearly define personal goals that are linked to the business goals.
7. Follow up and hold you accountable for implementing your plan; maintain momentum.
8. Provide on-call consulting access (phone and email).

## COACHING PROCESS

1. Our approach is to develop a relationship with your Wealth Advisor team and work within your style and unique needs. The process begins with a structured discovery method that includes assessments, personality profiling, questionnaires and goals exercises to quickly understand you and what you want to accomplish. Together we develop growth-focused projects that address each critical practice area. The general focus of coaching session may include:
  - Continual growth aimed at a planned-mix book of business through:
    - New client acquisition including target marketing, referral prospecting, and developing client advocacy.
    - Increasing wallet share through account penetration, family line extension, wealth transfer.
    - Improving revenue returns (predictable and profitable) with asset management processes, systems and communication management systems.
  - Building teams for accelerated growth, impeccable client service, specific product and service expertise, competitive advantage, succession and exit strategies, and life flexibility.
  - Leveraging resources, strategic alliances and professionally collaborative lines of business.
  - Taking care of self, managing mental and emotional states for optimum attitude control, managing personal goals and time use to get important things done.
2. We meet monthly in-person (at Advisor's branch when possible) and conduct phone sessions between appointments that keep the advisors on track and taking action.
3. We provide proprietary materials, Strategic Development Process Package, as a guide and reference for business planning and execution.
4. Subsequent sessions follow a process-oriented format that reviews victories and projects status, address recent issues, determine new goals, solve problems and assign new tasks.



## COACHING FORMAT

- On-site private coaching and consulting meetings (by telephone when on-site is not possible).
- Most typically, an advisor or team engagement is one monthly in-person meeting (time varies based on situation, typically 90-120 minutes, but half-day or full day are also available) plus mid-month phone conferences, email exchange and impromptu just-in-time availability.
- Prices are either contracted or available by proposal and are separate from travel and training/assessment materials expense. Call Edwards Holliday to discuss what you need.

## ABOUT EDWARDS A. HOLLIDAY

- 29 years of consulting and coaching experience
- Consulted with over 2000 Financial Advisors in 9 major firms
- AECS, Accredited Expert in Consultative Selling
- Certified Facilitator and Franchise Partner, Leadership Management, Inc.
- Certified DISC Facilitator, Target Training International and Inscape/Wiley Publishing
- Certified SDI Facilitator, Personal Strengths Publishing
- Distributor, Fascination Advantage Report

Edwards A. Holliday is President of Atlantic Leadership Group, based in Maryland and established in 1989. He works with his wife and partner, Melba Holliday, and collaborates with peer consultants nationally. His mission is to help Advisors grow their revenues and assets, better manage their businesses, and achieve their personal goals. Edwards helps clients measurably improve performance. Clients typically average 15-30% increases in productivity per year in assets gathered, revenue growth or fee-based growth.

Edwards is a certified facilitator and business coach and he has helped thousands of individuals in different service industries to develop their leadership and management skills and set and achieve their goals. Edwards began his career as a franchise partner with Texas-based Leadership Management, Inc., a world leader in programs and processes for developing leaders and organizations to their full potential. Founded in 1966, LMI has become an extensive, far-reaching organization with materials produced in 23 languages and marketed in more than 60 countries worldwide.

In 1996 Edwards started working exclusively with Financial Advisors and their managers. He has personally consulted with over 2000 Financial Advisors in more than 9 firms. His clients currently include four leading Wall Street wirehouses (Global Wealth Management and Private Wealth Management) and select regional firms. Edwards researches validated best practices and transforms proven ideas into innovative solutions for clients. He has more than 100 published profile articles on business leaders and what makes them effective.