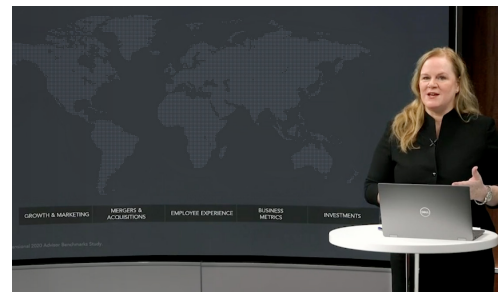


Advisor Growth Workshop

Business Strategy Training Offered through Dimensional 360®

This interactive event combines research data, strategic planning, and practical exercises to help advisors create a plan for business growth.



Details

The full workshop lasts 4–6 hours and can be held as a single session or in multiple sessions, depending on size and scope. We can tailor a workshop for a small advisor group or conduct a firm-wide event that includes leaders. (We recommend a minimum of five participants.) Training is also offered through one-on-one discussions. The event may require prework by participants.

Benefits

- Explore strategies, personal goals, and key metrics around business growth.
- Create a plan for generating prospects through referrals from current clients and centers of influence (COI).

Objectives

- Learn how to identify an ideal target client profile.
- Develop an understanding of the Cornerstones of Advice framework, and determine how to exhibit value to prospective clients.

Participants

- Growth-minded wealth advisors and firm leaders
- Firms that want to encourage client referrals
- Business development and client support staff



Workshop Sample Agenda

6-Hour Sample Workshop

9:00–9:25 am	Introduction
9:25–10:00 am	Insights on Growth
10:00–10:15 am	<i>Break</i>
10:15–10:50 am	Core Why
10:50–11:30 am	Target Client Profile
11:30 am–12:15 pm	Defining Your Value Proposition
12:15–1:15 pm	<i>Lunch</i>
1:15–2:00 pm	Driving Client Referrals
2:00–2:45 pm	Art of the Sales Conversation
2:45–3:00 pm	SMART Goals and Action Items

This information is provided for registered investment advisors and institutional investors and is not intended for public use. Dimensional Fund Advisors LP is an investment advisor registered with the Securities and Exchange Commission.

dimensional.com