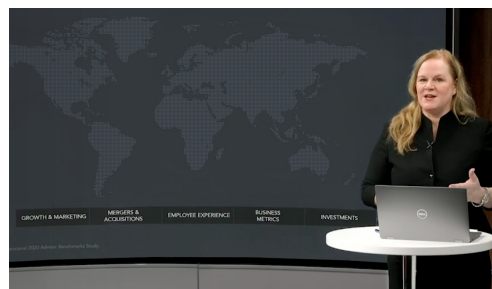


Advisor Growth Workshop

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

This material should be regarded as educational and nothing discussed or suggested should be construed as permission to supersede or circumvent any of your firm's policies, procedures, rules, and guidelines.

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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 |

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