



Cannon Pathfinder Program Overview

Who will benefit?	<p>Advisors who have been in business at least five years with assets under management of at least \$50 million, and who:</p> <ul style="list-style-type: none">- Are committed to refining and growing a client-focused, consistent and comprehensive wealth advisory practice.- Sincerely need and want to improve their practices and will commit to spending the time and effort required to do so.
What will you receive?	<p>We will help you define a clear, detailed description of your ideal practice based on our comprehensive, 35-point assessment of your practice and onsite interview, and we will help you create a customized program to achieve it.</p> <p>We will help you retain and expand your current client relationships by implementing a comprehensive profiling and wealth management process and defining or refining robust client communications and recognition plans.</p> <p>We will help you develop marketing strategies and messaging to create and capitalize on opportunities to attract new clients.</p> <p>We will help you develop and implement initiatives to create consistency in how your practice is supported and managed.</p> <p>We will provide special on-site support in building your knowledge and skills and by presenting to your clients and prospects a client event that will drive immediate new business to your firm.</p>
How will it be delivered?	<p>Initial 1-day meeting at advisor's office location, with pre-work</p> <p>Written assessment of current practice and custom program plan</p> <p>Eleven-module, bi-monthly coaching calls, custom sequenced based on your program plan, including:</p> <ul style="list-style-type: none">- Week 1 conference call – introduction & discussion of topic, implementation assignment, tools and resources- Week 2 email – check-in for accountability and to answer questions- Week 3 conference call – review of materials, discussion of implementation process- Week 4 email – check-in for accountability <p>At month 6, onsite visit by Cannon instructor for deep skill training <u>plus</u> presentation that evening at a 13 Wealth Management Issues client event to generate new revenues</p>
What is your investment?	<p>\$15,000 per practice, which covers all assessments, all coaching interactions, special skill training, client event speaker fee, and coaching materials, and billed in 3 installments.</p> <p>Travel and accommodations expenses for initial onsite visit and special skill training/client event visit are invoiced when they occur.</p> <p>Coaching clients also receive special pricing on all Cannon resources.</p>

Program Details

Initial Onsite Visit

	Objectives	Tools & Resources
Pre-work	Complete Pathfinder practice assessment Complete Managing for Success assessments Review Purpose discussion questions	Pathfinder Practice assessment Online assessment tools Pathfinder guides
Session 1	Review pre-work assessments Discuss current Client Experience <ul style="list-style-type: none"> - Client advice process – profiling, planning, implementation, progress review - Client service standards – administration & operations, communications & education, recognition 	Pathfinder guides for client experience
Session 2	Develop Ideal Practice description <ul style="list-style-type: none"> - Vision of ideal practice - Core beliefs – investment & Business philosophies - Ideal client description - Purpose or mission 	Pathfinder guides & templates

Coaching Call Modules

	Objectives	Tools & Resources
Module 1	Strategic overview <ul style="list-style-type: none"> - Discuss assessment of current practice vs. vision of ideal practice - Determine and prioritize strategic initiatives (will impact order of modules) - Assign ownership and completion or implementation dates 	Assessment of current practice vs. ideal practice Strategic initiatives template
Module 2	Retain Current Clients I <ul style="list-style-type: none"> - Refine client advice process - Implement comprehensive profiling & wealth management processes 	Pathfinder guides & templates for client advice process 13 Wealth Management issues template
Module 3	Retain Current Clients II <ul style="list-style-type: none"> - Refine client service standards - Refine & implement client communications plan - Refine & implement client recognition plan 	Pathfinder guides & templates for client service standards

	Objectives	Tools & Resources
Module 4	<p>Expand Current Client Relationships (including plan for low ROI clients)</p> <ul style="list-style-type: none"> - Develop segmented client lists - Develop & implement 7-step Investment Interview process - Develop & implement plan for low ROI clients 	<p>Pathfinder guide & template for client segmentation</p> <p>7-step Investment Interview checklist</p>
Module 5	<p>Create Opportunities to Attract New Clients I</p> <ul style="list-style-type: none"> - Develop target client profile - Develop branding messaging, including brochure and website 	<p>Pathfinder guides & templates for target markets, value proposition, marketing collateral & website</p>
Module 6	<p>Create Opportunities to Attract New Clients II</p> <ul style="list-style-type: none"> - Develop marketing plan - Develop & implement referral initiative 	<p>Marketing plan template</p> <p>Pathfinder guide & templates for promoting referrals</p>
Module 7	<p>Create Opportunities to Attract New Clients III</p> <ul style="list-style-type: none"> - Develop & implement COI initiative - Develop & implement direct marketing initiative 	<p>Pathfinder guide & template for cultivating COI relationships</p>
Module 8	<p>Capitalize on Opportunities to Attract New Clients</p> <ul style="list-style-type: none"> - Develop & implement process set initial interview - Develop & implement process to conduct interview & presentation 	<p>Pathfinder guide for process to determine fit</p> <p>Templates for prospective client pipeline, client interview & presentation</p>
Module 9	<p>Support I</p> <ul style="list-style-type: none"> - Develop & implement initiatives for professional & support team development 	<p>Pathfinder guides & templates for team development, team structure, roles & responsibilities</p>
Module 10	<p>Support II</p> <ul style="list-style-type: none"> - Develop & implement initiatives to insure consistency, including policies & procedures, technology & tools, physical resources 	<p>Operating Manual checklist</p> <p>Template & sample document for policies & procedures</p> <p>Pathfinder guides for real estate, office furnishings & décor, technology & office equipment</p>
Module 11	<p>Planning</p> <ul style="list-style-type: none"> - Develop & implement ongoing business planning and review process - Develop & implement business continuity plan - Develop & implement transition plan 	<p>Business plan assessment</p> <p>Pathfinder guides & templates for business, continuity and transition planning</p>