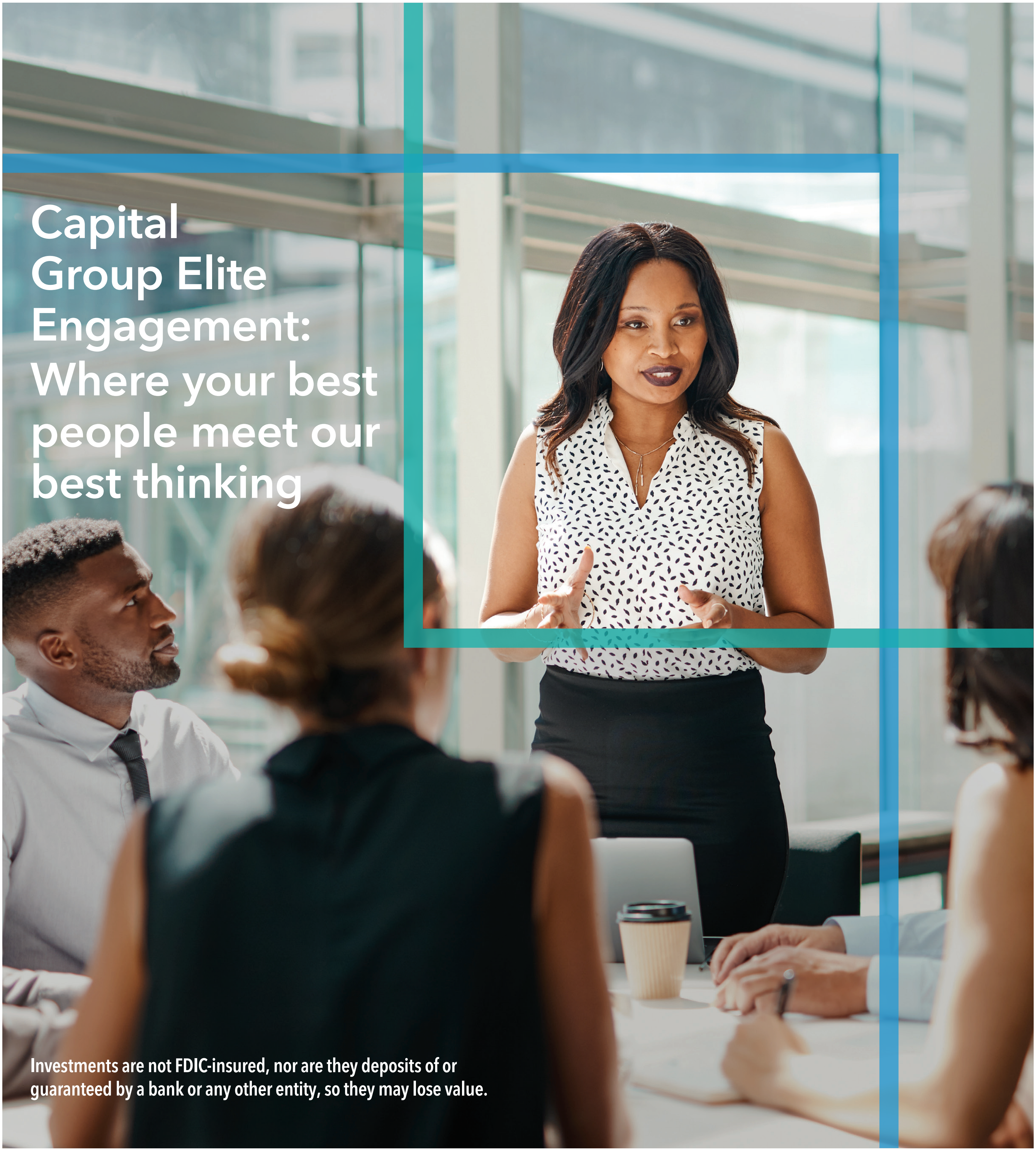
Practice Management

Elite Engagement™

CAPITAL GROUP® | AMERICAN FUNDS®



Capital Group Elite Engagement: Where your best people meet our best thinking

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

Capital Group has decades of experience helping advisors successfully manage investments, support clients and strengthen their practice.

Elite Engagement offers small-group workshops and personalized consulting designed to help select advisors move their practices forward.

We design customized learning experiences built for the needs of today's high-performing advisors who need to:

- Acquire new clients using more targeted marketing
- Exceed clients' expectations by delivering more personalized services
- Gain time through greater scale and efficiency

Designed around your learning goals

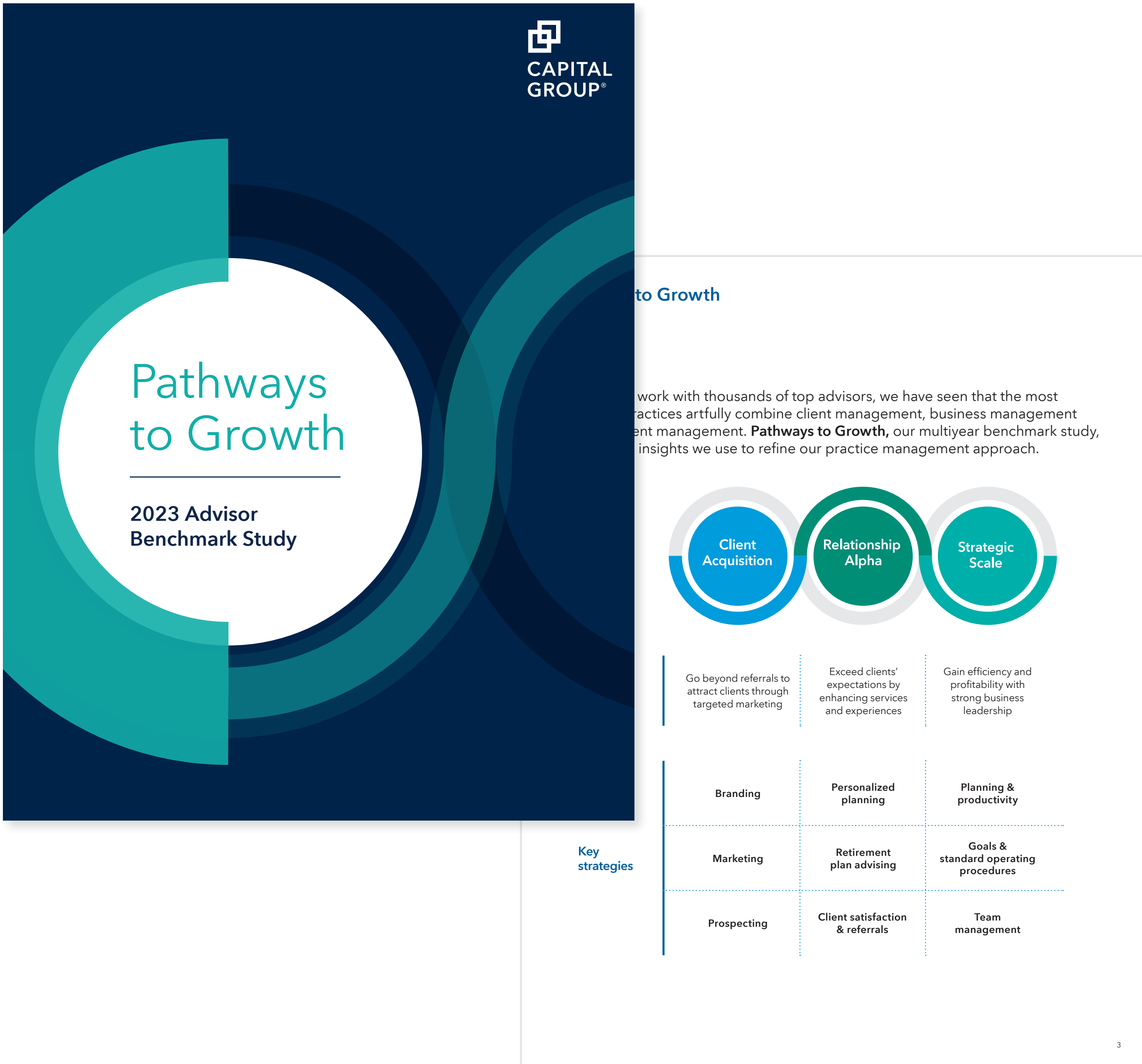
Presentation
Large groups

Workshop
Small-group cohort

Consulting
One advisor or team

"Capital Group provided the insight and motivation to build a vision for our team – and the critical steps to achieve success."

– Independent financial advisor



Capital Group's latest advisor benchmarking study sets out to shed more light on our initial findings about what the highest growth advisors do differently, and which behaviors and skills prompted their exceptional growth.

Elite Engagement enables advisors to tailor their needs against the nine key skills that drive growth.

Tailored learning experiences covering a broad array of skills

Elite Engagement workshops give you insight and tips you can use today to help boost branding and client acquisition, team management, succession planning – and more.

"Who's going to take care of my clients after I retire?"

A leader's guide to succession planning

Leverage key components of leadership to create a succession plan that both helps ensure your legacy and puts clients first.

- Prepare clients for your exit and your firm's next generation of leaders
- Get your team ready to serve clients' needs into the future
- Set your business up for ongoing success

Skills we will teach you:

Team management, Goals & standard operating procedures, Client satisfaction & referrals

"I need a new way of talking to clients about retirement realities."

Acquiring modern retirees: Strategies for growing your practice

Grow your business by redefining your role as a retirement income specialist and positioning yourself as essential to helping clients achieve their retirement goals.

- Use the five retirement realities to illustrate why clients should consider consolidating assets with you
- Tailor your client engagement approach to clients' retirement readiness
- Build your website and LinkedIn profiles to showcase your retirement income focus

Skills we will teach you:

Branding, Marketing, Personalized planning, Retirement plan advising

"How do I start attracting more of the 'right' kinds of clients?"

Acquire the ideal client

Gain techniques to identify the clients you are best set up to serve, and build a marketing strategy to acquire more like them.

- Help differentiate between having a niche and creating a client persona
- Create an ideal client persona aligned with your competencies
- Target your ideal clients with key marketing strategies

Skills we will teach you:

Branding, Marketing, Prospecting

"I've never been comfortable talking to clients about my fees."

Deliver priceless value

Get essential skills for building high-quality client experiences that exceed expectations and are priced to reflect the value you offer.

- Have a pricing conversation that establishes your value
- Engage clients to understand their expectations – and exceed them
- Create a consistently excellent client experience

Skills we will teach you:

Client satisfaction & referrals, Planning & productivity

"I did not even realize I was caught in a performance trap."

Deliver results, not performance

Improve investor outcomes by learning how to align portfolio objectives to client goals.

- Reframe how clients perceive success and learn why that's important
- Use our Goals Prioritization System (GPS) to clarify risks
- Report progress on clients' goals while avoiding the performance trap

Skills we will teach you:

Team management, Goals & standard operating procedures,
Client satisfaction & referrals

"How can I run my business? Because right now, it's running me."

Drive productivity and efficiency

Gain the skills you need to think like a CEO and uncover clients' hidden value.

- Apply metrics that build your firm's capacity to do more efficiently
- Drive growth by focusing on the Real relationship value (RRV) of existing relationships
- Save time with our approach to crucial client conversations

Skills we will teach you:

Planning & productivity, Team management, Goals & standard operating procedures

"Asking for more referrals wasn't getting me where I needed to go."

Fuel growth with a COI engagement strategy

Access a client-centric method for generating new referral streams with a center-of-influence (COI) strategy.

- Understand why social currency is the key to referrals
- Identify the engaged clients likely to generate COI introductions
- Build partnerships with our three-step COI referral strategy

Skills we will teach you:

Marketing, Prospecting, Branding

"I didn't think I had time to use social media for my business."

Prospect and grow using digital strategies

Get methods to help build your digital presence and attract new clients.

- Learn from a case study on creating a differentiated website bio and LinkedIn profile
- Develop a brand ambassador program designed to attract referrals
- Master the art of leading engaging virtual client meetings

Skills we will teach you:

Prospecting, Branding, Marketing

"I never saw myself as having a 'brand'."

Turbocharge your brand

Learn to define and differentiate your brand in a way that helps you stand out.

- Identify your key differentiators
- Articulate the "who, what and why" of your brand in a conversational tone
- Learn how to create a brand that demonstrates your value to clients

Skills we will teach you:

Branding, Marketing, Prospecting

"My clients' expectations are changing faster every day."

Future-proof your practice

Grow and adapt your practice to the changing needs of clients with this series of three workshops.

The **Differentiation** workshop helps advisors expand client acquisition efforts by working with multiple generations and across communities that represent unrealized opportunities for our industry.

Skills we will teach you:

Branding, Marketing, Prospecting

The **Resilience** workshop helps deepen current relationships while also engaging the next generation. We show you how to host a successful family wealth briefing using a template designed to help you develop a multigenerational practice.

Skills we will teach you:

Marketing, Prospecting

The **Growth** workshop helps advisors manage growing practices, including building resilient teams and planning your exit strategy. We will also do a deep dive into leadership styles, and offer best practices for recruiting and developing talent, as well as a framework for the initial phase of a succession plan.

Skills we will teach you:

Branding, Marketing, Personalized planning, Retirement plan advising, Team management

Guided by experienced consultants

Our team of practice management consultants understands why advisors succeed, and we connect them to the learning resources designed to help them meet their most important challenges and goals.

Paul Cieslik
Advisor Practice
Management Consultant

Paul is a business coach who works with thousands of professionals each year on the mindset needed to take a financial advisor practice to the next level. His decades of investment industry experience include over 22 years at Capital Group.

Wassan M. Kasey
Advisor Practice
Management Consultant

Wassan is passionate about helping advisors develop successful and thriving practices. With over 20 years of investment industry experience, Wassan specializes in creating a personalized approach to selling and challenging advisors to view their business differently.

Max McQuiston, CIMA®, CFP™, RMA®
Advisor Practice
Management Consultant

Max leverages his experiences working with thousands of practices to help advisors meet both their goals and those of their clients. He challenges advisors to look for pathways to create scale and efficiency. He has more than 30 years of investment industry experience.

Leah Ryan, CRPC®
Advisor Practice
Management Consultant

Leah is a seasoned financial services professional with more than 25 years of experience in the investment and insurance industry. Passionate about helping financial professionals take their practices to the next level, she takes an approach that is all about ease of understanding, empathy and compassion.

Jon Wainman
Advisor Practice
Management Consultant

Jon has over 20 years of industry experience. He brings a passion for motivating financial professionals in practice management, client management and sales strategy.

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