

ENTERPRISE SOLUTIONS

Virtual Practice Management Department

Pareto Systems collaborates with financial advisory firms that are committed to advisor best practices and understand the importance of continuous investment in practice management for their advisors.

The goal is to help advisors build their Best Practices Playbook to lock down their organic growth and shift to a scalable growth model. The Playbook focuses on:

Refining Their Branding & Communication

Have the advisor perceived as a consultant with a process, not as a salesperson with a quota. Ensure that their clients focus on what they are worth, rather than what they cost

Fast-Tracking New Clients to Advocacy

Refine, develop & deliver a process to onboard new clients. Ensure consistency for every client and bring them quickly to advocate status

Maximizing Existing Client Relationships

Ensure that all of the advisors existing clients are working with them in the true spirit of partnership and understand and appreciate all their services going forward

Organizing Their Clients

Create a Client Classification framework based on assets, attitude and advocacy that will sort and organize their clients in a meaningful way

Elevating the Client Experience

Ensure advisors deliver ongoing client service with the highest degree of consistency and predictability to build trust and satisfaction

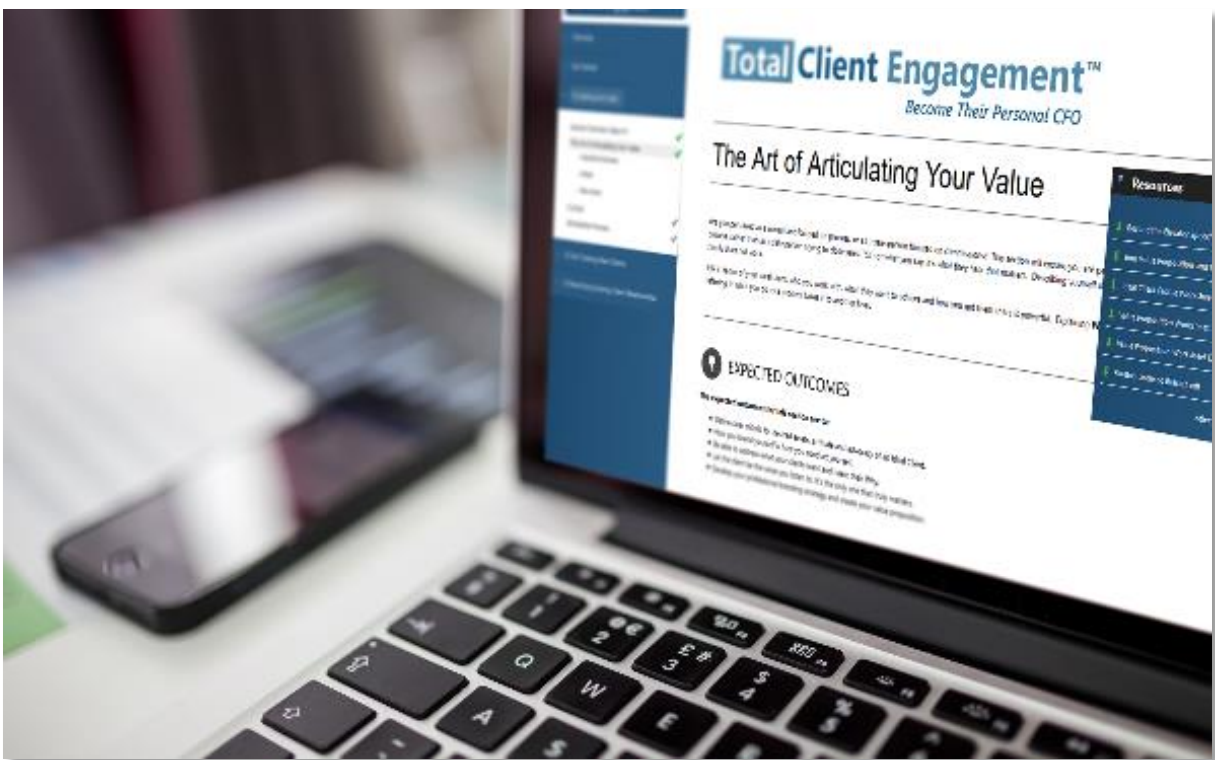
Professionalizing & Standardizing Their Business

Create organization and clarity in the operation of the business and initiate high levels of quality control across all team members

The Solution

As part of this collaboration, Pareto Systems will be positioned as the Virtual practice Management Department, offering practice management and business development solutions that, among other things, include:

- 1) **Ongoing Webinar Series** – Hosted by Duncan MacPherson and other Pareto Systems Business Advisors, these actionable webinars focus on key practice management strategies to help advisors and their teams achieve a breakthrough in their business. These live and recorded webinars help firms scale their practice management initiatives through technology and automation.
- 2) **Access to Pareto Academy** - The solution is supported and made actionable through the Pareto Academy, an online virtual coaching dashboard that acts as a step-by-step virtual playbook for implementation. Advisors have access to videos, articles, scripts, agendas, templates and tools.



- 3) **Seats at Mastermind** – Join Duncan MacPherson and a small group of like-minded Advisors, as they dive deep into our Total Client Engagement Process. Mastermind Events are typically held once per month in Palm Springs, CA or Kelowna, BC. Based on availability, limited seats of 25 per event.