

## Webinar Series

# Strategic Relationships

### A FIRST TRUST & PARETO SYSTEMS COLLABORATION\*

Few professional advisors have cracked the code when it comes to consistently attracting introductions from other influencers and rainmakers who are not clients. In this series, Pareto Systems' esteemed consultants, Sherri Palle and Terry Gronbeck-Jones, will lay out the processes that ensures you elevate your client relationships through these professionals and develop a two-way street of introductions with your strategic relationships.

In this four-part webinar series, supported by the Pareto Academy, you work through a process to:

- Communicate & demonstrate your value to strategic partners
- Delineate and position your process to strategic partners
- Contrast yourself favorably from other advisors
- Develop an exceptional ongoing experience for your strategic partners
- Position an introduction process as a service you provide

### WEBINAR SERIES

Session #1: The Power of Strategic Relationships: Unlocking Mutual Growth

Session #2: Find the Perfect Match: Unveiling Your Ideal Strategic Partners

Session #3: The Strategic Partner Blueprint: Nurturing Meaningful Connections

Session #4: Amplify Your VAST Network: Demonstrating Value to Clients

### HOSTED BY

**Sherri Palle**  
Pareto Business Consultant



**Terry Gronbeck-Jones**  
Pareto Business Consultant

### DURATION AND TIME COMMITMENT

Three-month series and approximately 2-3 hours per week for program study and implementation. Sessions are approximately two weeks apart.

*\*Speak to your First Trust wholesaler to register*

