SET YOUR PRACTICE APART.

WE'RE BEHIND YOU.

ADVISOR GROWTH TEAM

National Planning Holdings, Inc.

GROW YOUR BUSINESS YOUR WAY

You already have big plans for your practice, so we won't get in the way. Instead, our Advisor Growth Team will help target your goals with a customized strategy tailored to your unique business. Exclusive to the National Planning Holdings® Inc. network, this experienced group offers one-on-one, in-depth programs that can help you optimize growth, maximize revenue and provide exceptional service to clients.

Trying to reach the next level of success? Our signature approach has helped advisors develop and execute a plan for GDC growth.

The Journey Ahead

By completing the Advisor Growth Team program, you'll be ready to enhance your practice by:

- Creating a business strategy for sustainability and profitability
- Following a simple, sustainable marketing approach that resonates with your clients
- Developing strategies and processes to fit your goals for growth
- Installing procedures that support the life of your business and provide peace of mind

Ready to get started? The first step is scheduling a complimentary session to complete and review our proprietary ASSESS questionnaire – the primary driver of your business roadmap.

BUILD YOUR PRACTICE WITH UNMATCHED SUPPORT

The **Advisor Growth Team** platform is designed for flexibility, offering programs that are as unique and dynamic as the advisors they assist. No matter what you aim to achieve in your business, our comprehensive program offers resources and strategies to help you reach your goals.

CONSULTING: Strengthen Your Foundation

Rather than offering the same fixed program, each advisor engagement is designed to meet your specific needs. After revealing your strengths and challenges through our proprietary ASSESS questionnaire, we'll design a personalized business strategy using our proven system. By addressing the four cornerstones of a successful practice, our consulting approach helps advisors identify challenges, find solutions and reach the next level of success. You can choose to focus on two cornerstones during a three-month consulting program, or explore all four modules in 18 appointments over six months.

Program Options

3-Month Program • 6 Appointments • 1-2 Modules • $1,800 ($600 Monthly)

6-Month Program • 18 Appointments • 3-4 Modules • $4,500 ($750 Monthly)

GROUP CONSULTING: Grow Your Practice

The comprehensive Group Consulting Program incorporates coaching, in-depth professional development and training, and peer-to-peer learning in regularly scheduled, in-person workshops. You can implement strategies between sessions, then get practical feedback at the next meeting.

Program duration and pricing tailored to group preference and need

EDUCATION: Stay in the Know

The Advisor Growth Team researches, prepares and delivers high-quality presentations to keep you up to date on the latest practice management strategies. You'll also get exclusive monthly webinars on a variety of practical subjects, such as best practices from top-producing advisors, strategic partners and practice management consultants.

Complimentary

COACHING: Focus on Improvement

Through an emphasis on time management, work-life balance and leadership training, our one-on-one mentoring programs help you develop successful habits in all aspects of life. You'll be challenged to make improvements that have a long-term impact on both your business success and personal fulfillment.

12 - Month Program
12 Appointments
$1,500 ($125 monthly)

THE FOUR CORNERSTONES OF SUCCESS

There's no one-size-fits-all solution to business growth. Our consulting programs will help you examine the most important aspects of your business and develop a customized plan to move your practice forward.

Business Strategy

Develop a vision for the future of your practice, starting with a written plan of action that establishes direction, goals and action steps.

Areas of focus: goal setting, time management, client segmentation and profitability, and client service plans.

Marketing

Communicate a compelling message about your value and services to secure existing clients, reach prospects and drive your firm's business growth.

Areas of focus: brand identity, developing a marketing plan, digital and social media strategies, and defining natural markets.

Human Capital

Realize the value of the personnel you employ and implement management techniques to maximize the effectiveness of your team.

Areas of focus: staffing and workflow, standardization of key processes, compensation planning and technology optimization.

Business Evolution

(Succession, mergers, acquisitions)

Create further peace of mind for yourself and your clients by developing a sound plan for succession and/or growth.

Areas of focus: benchmark analysis, emergency planning, and entity structure review for acquisition, growth and transition strategies.

MEET YOUR PRACTICE MANAGEMENT TEAM

Maria Lindsley, Vice President, Practice Management Consultant

Maria is a seasoned sales and marketing professional, business development leader and entrepreneur who came to NPC with over 20 years of industry experience. She has helped many organizations and advisors strengthen their market position, boost client acquisition and retention, and exceed production goals. Her prior work experience includes positions at Allianz Life Insurance Company of North America, Fortis and ING (formerly ReliaStar). She holds FINRA Series 7, 24 and 63 registrations. Maria received her Bachelor of Business Administration degree in Management and Marketing from the University of Wisconsin-Madison.

Melissa Mrazek, Vice President, Practice Management

Melissa began her career in the financial services industry in 2004. Previously, she served as assistant vice president and head of practice management at Curian Capital. Prior to her role at Curian, Melissa served as a senior advisor consultant for Raymond James Financial, where she specialized in practice management, succession planning and acquisitions. She also worked at Northwestern Mutual as a member of the company's investment products and services department. Melissa earned a bachelor's degree in business management from the University of South Florida, where she also studied psychology. In addition, she holds a Series 7 securities registration.

Mark Page, Vice President, Practice Management Consultant

Mark began his career as a financial advisor and has also held positions as a stockbroker and an investment trader. Before joining National Planning Holdings, he worked as a regional sales manager with Wells Fargo and FBS Investment Services, and held regional vice president positions with MFS Distributors, Allianz Investor Services and Genworth Financial Wealth Management. He has over 23 years of experience in the financial services industry. Mark currently holds FINRA Series 4, 7, 22, 24, 53 and 63 registrations, in addition to life, accident and health insurance licenses. He received his bachelor's degree in Economics from the University of Minnesota.

"At first I was skeptical as to whether the Advisor Growth Team could really help us address the issues facing our practice, but after the completion of the program, **I can confirm it is a formula for success.** My staff has seen their roles redefined and the purpose of our practice clearly outlined like never before. You won't regret this commitment. **The program changed the way I manage my time, staff, clients and the direction of my entire firm."**

— Mike C., Archbold, OH

"The best thing about this program is that without it, I wouldn't be taking the time to work *on* my business instead of just *in* my business. The program forces me to take time to look at the state of my practice instead of simply serving clients. **You cannot place a price tag on what you do… it is priceless."**

— Virgil K., Wyomissing, PA

"Anyone interested in running a business, not simply being a practitioner, must use the Advisor Growth Team. After more than 30 years in the industry, this process was vitally important for my business continuation plan. **This program forces you to do your homework, create a business model and follow it** – making your practice more valuable when it comes time to sell it."

— Alex V., Whitehouse Station, NJ

"The Advisor Growth Team pushed us to look at weak areas in our company and refine our strengths, and that really pressed us to think and act like business owners. Too often, we run our business like advisors. The Advisor Growth Team is also not coaching from a script: **They gave us tailored advice from their collective experience, constantly looking at obstacles and opportunities from different angles.** I would go through the program again."

— Chris M., Flowood, MS

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