# FLX Business Accelerator

Formerly *Focus Partners*

Accelerating growth through practice management, coaching, and value add programs

# COACHING FOR GROWTH

## The heart and soul of the FLX Business Accelerator revolves around our coaching and value-added workshops.

**18+ years**

Helping financial professionals and the firms they work for take their business to the next level.

**8**

Professionals make up our coaching team.

**25 years**

Average experience in the Financial Services Industry.

### We measure coaching success in two ways:

**Client Success**

**Longevity With Our Firm**

Ultimately, it comes down to the bottom line: Consistent growth of revenue and assets under management.

While results may vary, our advisor clients substantially outpace their peers.

We feel that our client tenure is a testament to the way we work to develop long-term relationships. We develop the same relationships with our clients that we want our advisors to develop with theirs.

We are proud to say that our average client tenure is over 4.5 years, and our first coaching clients from over 18 years ago are still with us today!

FLX NETWORKS

# COACHING FOR GROWTH

## Since one investment philosophy does not fit every investor, why would one coaching model fit every advisor?

We approach our clients the same way advisors approach their prospects: “customized but consistent” coaching.

### Our Proven Three-Step Practice Optimization Approach Focuses On:

The individual needs of the advisor/team and targets their unique areas of opportunity for growth or organization.

Providing advisors with the right tools and approach to maximize performance across key components of any advisory practice.

This bespoke approach works well with our diverse advisor clientele. We have coached (currently or past) hundreds of advisors at all production/GDC levels, from new advisors to teams producing over $70 million in revenue.

Every client has different needs, but the one common thread that runs through every engagement is the need to grow assets under management.

We help our advisors gather additional assets from existing relationships, and prospect for new business through various client acquisition and marketing strategies.

In addition, we work to improve operational processes to create capacity and directly impact revenue.

# PRACTICE OPTIMIZATION

## Plan & Position

- Value proposition
- Mission statement / elevator pitch
- Key differentiators
- Business planning
- Marketing plan development
- Goals / action plans

## Organize & Optimize

- Client segmentation
- Pipeline tracking
- Team development
- FA as leader training
- Roles and responsibilities
- 90-day new client onboarding process
- Client review process
- Compensation planning
- Succession planning
- Time management

## Execute & Engage

- Service model
- The WOW Experience
- Referral / qualified introduction campaigns
- Digital strategies
- Marketing (organic, new client acquisition, COI)
- Client appreciation
- Mailings
- Intimate events / seminars
- Networking groups
- Client advisory boards
- Social media

# COACHING MODEL

## "One size *never* fits all."

A customized coaching model that revolves around you, your team, and your needs. We look to become a part of your virtual team and form the kind of relationship that you want to have with your clients.

Here for you when you need us

- Monthly calls with advisors.
- Monthly check in support calls with team members as needed.
- Ad-hoc phone as email support as needed

# EXECUTABLE AND TACTICAL

In today's changing world, it is critical that firms support their advisors by providing the tools and resources they need to succeed. Advisors will need additional skills, strategies, and tactics to address common business challenges and drive practice performance. Providing these resources to help advisors succeed has become an important priority for both small and large firms.

However, many firms are challenged to provide these solutions with their current resources. To address these pain points, FLX Business Accelerator works with firms across the country by becoming an outsourced practice management resource.

## Virtual Practice Management

As a full service outsourced Virtual Practice Management provider, we work with firms of all shapes and sizes to:

- Ascertain their practice management needs
- Develop a customized practice management plan
- Strategically implement the plan using a variety of different mediums

### Workshops and Webcasts

These monthly 30-45 minute webcasts and live trainings are tactical in nature and focus on business building and practice management topics that advisors can implement TODAY to build and improve their practices.

### Articles and Content

From insightful thought leadership to business building marketing ideas, we provide firms with the content they need to stay relevant, timely, and tactical.

### Coaching

Personalized coaching tailored to your specific needs, helping you maximize your growth strategies and operational efficiencies.

# TAILORED OFFERINGS FOR YOUR UNIQUE NEEDS

## WEALTH MANAGEMENT FIRMS

Choose specific services that effectively augment and supplement your existing initiatives.

### Comprehensive Coaching and Practice Management

FLX Business Accelerator provides the necessary tools and resources to help you fuel advisor growth and add operational efficiencies.

### Collaborative Advisor Support

Gain access to a network of support and expertise that will drive positive outcomes for your firm and your advisors.

### Hosted Advisor Events

Help your advisors grow and drive revenue by equipping them with tactical value-add ideas through branch, home office, or virtual events.

## FINANCIAL ADVISORS

From client acquisition strategies to generating referrals, executing a robust service model, and building the team of the future, we have curated a comprehensive suite of solutions addressing your top needs.

### Advisor Coaching Services

Personalized coaching tailored to your specific needs, helping you maximize your growth and operational efficiencies.

### Resources to Grow Your Practice

Access white papers, articles, templates, and peer share/virtual events to have the tools and thought leadership necessary to succeed.

## ASSET MANAGERS

Access an enhanced suite of solutions to showcase your firm and product capabilities.

### Comprehensive Wholesaler Coaching Program for Asset Manager Distribution Teams

Specialized coaching services designed to address the unique needs of distribution throughout the product lifecycle; providing valuable tools, insights, and strategies to optimize operations and drive exceptional results and AUM growth.

### Sponsor Events

Sponsor exclusive speaking engagements and events allowing you to establish yourself as an influential industry figure and promote your best ideas.

# 2024 WORKSHOP AND TRAINING TOPICS

1. The 45 Minute MBA: Running Your Practice Like a Business
2. Generate Practice Alpha
3. Elevating the Client Experience
4. Top 10 Advisor Marketing Ideas
5. The WOW Client Experience
6. Developing Your Yearly Business Plan
7. Cultivate Your Centers of Influence
8. Ideas for Virtual and Intimate Events
9. Top Marketing Ideas to Connect to the Next Generation
10. Advisor-phobia
11. Segment for Success
12. Client Onboarding - the First 90 Days
13. Best Practices When Using LinkedIn
14. 10 Questions to Ask in Every Meeting
15. Opportunity In Crisis - Strategies Client Retention and Growth
16. Become the New Age Advisor
17. The 45 Minute MBA for Sales Assistants

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## The 45 Minute MBA: Running Your Practice Like a Business

Today's top advisors understand that when you run a practice, you are essentially the CEO of your own company. Unfortunately, many advisors don’t know how to look "outside the advisory practice box" and think like a CEO. In this presentation, you will learn practice management best practices that other advisors and teams are implementing to run their practice like a business and free up capacity to focus on growth!

2

## Generate Practice Alpha

Alpha is defined as the excess return of an investment relative to the return of a benchmark index. It is performance above the benchmark. In an industry of "me too" commoditized advisors, what are you going to do to rise above the average? In this workshop we will discuss the 4 key areas of your practice where you can add alpha and give you tactical ideas you can implement immediately to add some boost to your business!

3

## Elevating the Client Experience

Like pricing and products, service has now become commoditized as well. In a world of "me too" advisors, success is dependent upon breaking the mold and de-commoditizing your practice. Elevating the Client Experience shows you how you can separate yourself from the competition by hearing what top producers and teams around the country have done to be totally different.

4

## Top 10 Advisor Marketing Ideas

For many advisors, their marketing is stuck in first gear. Top Marketing Ideas is for the advisor who is ready to add some "horsepower" to their marketing efforts in 2024. Chock full of great marketing ideas that can be implemented immediately, this workshop will help any advisor acquire new clients and retain existing ones!

## 5 The WOW Client Experience

What is it like when someone deals with you? Learn how to create the WOW factor that will differentiate your practice from your peers and make you REFERABLE.

## 6 Developing Your 2024 Business Plan

You can't get to where you're going if you don't have a map to get there.

## 7 Cultivate Your Centers of Influence

Everybody wants them, but how do you find and cultivate them? Learn how to identify, target and approach your clients (and other) trusted advisors

## 8 Ideas for Virtual and Intimate Events

Advisors have long used events to network, prospect and build rapport with clients, prospects, and COIs. With more and more people leveraging technology, it is incumbent upon advisors to adapt their events to the digital and virtual medium. Digital marketing is not going away, and advisors that embrace the medium(s) now will be ahead of the curve. In this workshop you will learn:

- What virtual marketing is and what you really need to focus on
- Top virtual marketing ideas that are working and that you can implement immediately

## 9 Top Marketing Ideas to Connect to the Next Generation

Everyone advisor wants to go multi-generational, but how do you really connect with the next generation? In this presentation, we will review different marketing strategies that you can implement immediately to gain traction, form bonds, and retain assets with your next generation of clients!

## 10 Advisor-phobia

Phobia - (Noun) - "To have a fear or other obstacle that prevents one from moving ahead in life or business."As advisors, there are many things that can hold us back. To succeed we need to figure out how to go around, through, over or under the wall. In this presentation, we pull back the curtain on 10 different advisor phobias and show you how to overcome the associated hurdles. No prescription necessary!

## 11 Segment for Success

Highlights the advantages of book segmentation and introduces strategies for creating a robust client service model within your practice.

## 12 Client Onboarding - The First 90 Days

Make sure you get your relationships off on the right foot by having a solid client onboarding process to create that WOW experience!

## 13 Best Practices When Using LinkedIn

LinkedIn is a goldmine for advisors, but only if you know how to use it and what to look for. In this presentation, advisors will learn the most effective ways to leverage this phenomenal resource to build more connectivity with clients, add more prospects to the pipeline and close more business.

## 14 10 Questions to Ask in Every Meeting

Meetings are your time to really find out what is important to your prospects or clients. In this presentation, learn the top questions you should be asking to build solid, long term, and profitable relationships!

## 15 Opportunity in Crisis: Strategies Client Retention and Growth

While our environment is unprecedented, there are numerous opportunities available for financial professionals to retain and build their client relationships while preparing for a post-pandemic world. Tactical and timely, we will share the top ideas and tactics advisors should be doing right now to stay ahead of the curve and leverage opportunities.

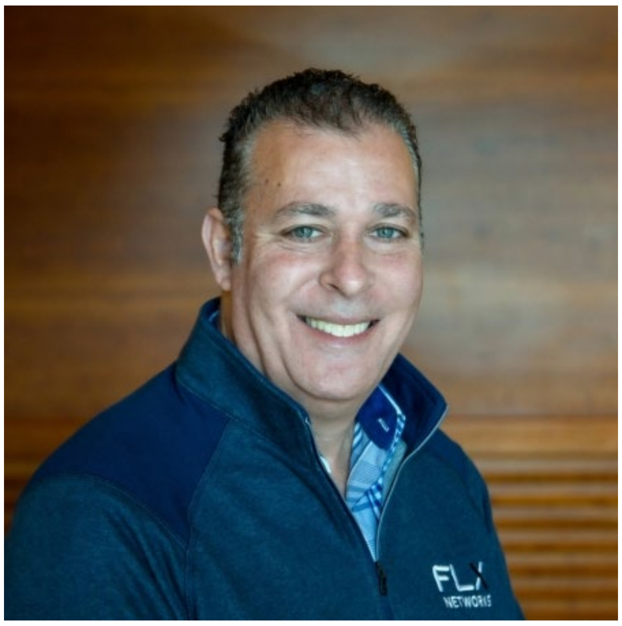
## 16 Become the New Age Advisor: Survive, Thrive & Grow in the New Normal

The financial advisor landscape has changed, possibly forever. The way we did things in the past will not be how we do things going forward. The advisor of the future needs to LEARN, ADAPT AND OVERCOME in order to survive and thrive in the new business environment. This presentation will discuss what advisors need to know about the client service and prospecting landscape going forward and how to take what you learn and adapt to the new environment so you can service your clients effectively AND win new business.

## 17 The 45 Minute MBA for Sales Assistants

Sales Assistants can have a dramatic impact on an advisor's business. In this presentation, sales assistants will learn different processes and ideas that they can implement with their advisors and teams to help propel them forward and get to the next level.

# Meet the Co-Heads of FLX Business Accelerator




**Eric Sheikowitz** is a dynamic, in-demand speaker, coach and consultant with over 27 years experience in sales and marketing and for over 17 years he has been coaching and consulting with some of the top Financial Advisors and Teams in the industry. He began his career in banking, servicing high net worth individuals and clients. Prior to starting Focus Partners, he was a Director and Manager for a Big Four Audit and Advisory firm, focusing on marketing/sales and service.

His tactical, laser focused approach enables him to help advisors and teams in all areas of the practice, including: client acquisition, marketing, practice management, team development and client service.

Eric holds a Bachelors degree from the University of Rhode Island, a Masters Degree from Long Island University and has received coach training from one of the leaders of the modern coaching movement. He is a regular contributor to Barron's, Advisor Hub and other industry publications and is a regular presenter at national conferences for Barron's and IMCA.

**Michael Silver** is a speaker, coach, and consultant who has worked with financial services firms and financial professionals (solo producers and advisor teams) for the past 30 years.

He focuses his coaching and consulting engagements on many areas, including: client acquisition, marketing, practice management, team development and client service. Michael was a financial advisor with Prudential Securities, Wachovia Securities and Ryan Beck, where he learned first-hand the power of creative networking, qualified introductions and relationship management.

Michael received a Bachelor of Science degree in Finance from Ithaca College and has his Certification in Organizational and Executive Coaching from New York University. He is a regular contributor to Barron's, Advisor Hub and other industry publications and is a regular presenter at national conferences for Barron's and IMCA. Along with his family, Michael is passionate about raising money for pediatric cancers and families in need with sick children.