

FINANCIAL ADVISORS

Focus Partners provides financial advisors with a comprehensive and customizable suite of coaching and practice management solutions to help navigate and thrive in the ever-changing financial landscape.

With personalized and group coaching, valuable content, and industry-leading support from Focus Partners (Co-founded by Michael Silver and Eric Sheikowitz), you can take your practice to new heights. From continued growth to attracting new business, running a successful practice, and planning for the future, we have curated solutions addressing your top needs.



Advisor Coaching Services

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

Experienced team with deep expertise in the advisor space. Focus Partners' coaches average 25 years of specialized industry experience.



Resources to Grow Your Practice

Leverage our breadth of practice management resources to effectively communicate your message and establish a robust brand presence as an advisor.

Access white papers, articles, templates, and peer share/virtual events to engage your clients and prospects more effectively.

Focus Partners' Proven Three-Step Practice Optimization Approach

Our **customized but consistent coaching approach** is based on the unique needs of each advisor. We allow for tailored coaching models while following a consistent framework called **Practice Optimization**.

This framework focuses on individual growth opportunities and organizational improvements, equipping advisors with effective tools and strategies to enhance performance in key areas of their advisory practice.

1

Plan & Position: Define strategic direction and create a business and marketing plan that aligns with your goals and objectives

2

Execute & Engage: Implement effective programs, campaigns, and tactics to execute the plan and engage with clients, prospects, and Centers of Influence (COI)

3

Organize & Optimize: Ensure the practice is supported by the right team and infrastructure, manage resources effectively, and utilize tracking systems for consistent execution

INTERESTED? CONTACT US AT FOCUSPARTNERS@FLXNETWORKS.COM

OR VISIT WWW.FOCUSVPM.COM TO LEARN MORE