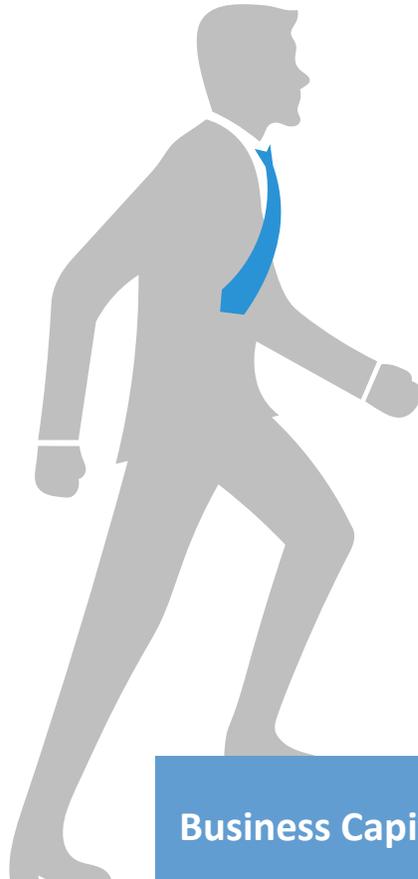


The Cornerstone Consulting Program

Transform Your Business With 4 Simple Systems

A Six Step Consulting Process

Transforming Your Business With Simple Systems



Human Capital

We start the engagement by leveraging best-in-class assessments and 1:1 interviews with you and your team.

Business Capital

A thorough assessment of your business assets is conducted leveraging a proprietary book analysis and a full SWOT report. This data is used to start the process of building your systems.

Client Touchpoint System

Most advisors do not have clarity on when they are communicating with their clients. This system will ensure that every client receives the proper communications from you and your team.

Wealth Management System

We help you build a wealth management system that provides clarity to your value proposition. The end result will be a branded process that is repeatable and scalable by adding rules-based portfolios and becoming a financial planning centered advisor.

Business Growth System

Once you have a system in place to take care of your clients and you have clarity on your value proposition, it is time to grow! Each engagement is different, but this system will help you by adding a relationship management system, building a niche, a COI marketing system and a digital/content marketing system.

Leadership System

The number one driver of success in our industry is LEADERSHIP. Most advisors struggle to lead themselves and their team. We will leverage a system that high growth companies such as Google, Amazon, Disney, BMW and others use for accountability. The OKR leadership system will be the framework that helps you drive results and become a better leader after the Cornerstone Program is complete.

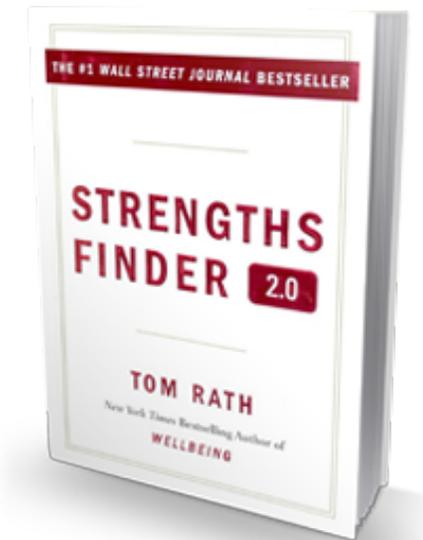
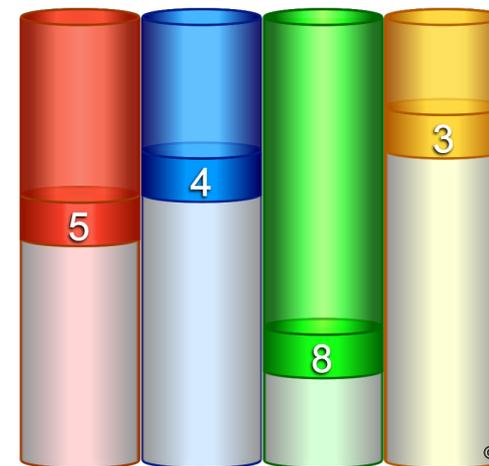


Human Capital Analysis

Transforming Your Business With Simple Systems

We start the consulting engagement by leveraging the Kolbe A assessment and the Strengths Finder to uncover key insights into how you and your team work best.

The process will help determine if you have the right people in the right roles on your team. The exercise will also dramatically improve communications in your business.





Business Capital Analysis

Transforming Your Business With Simple Systems

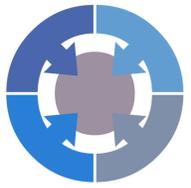
A thorough assessment of your business assets are conducted. It starts with our proprietary book analysis and client segmentation report. This is a quantitative report and analysis of your business.

A full SWOT report is created and the data is used to start the process of building your custom business systems.

Book Analysis & SWOT Report

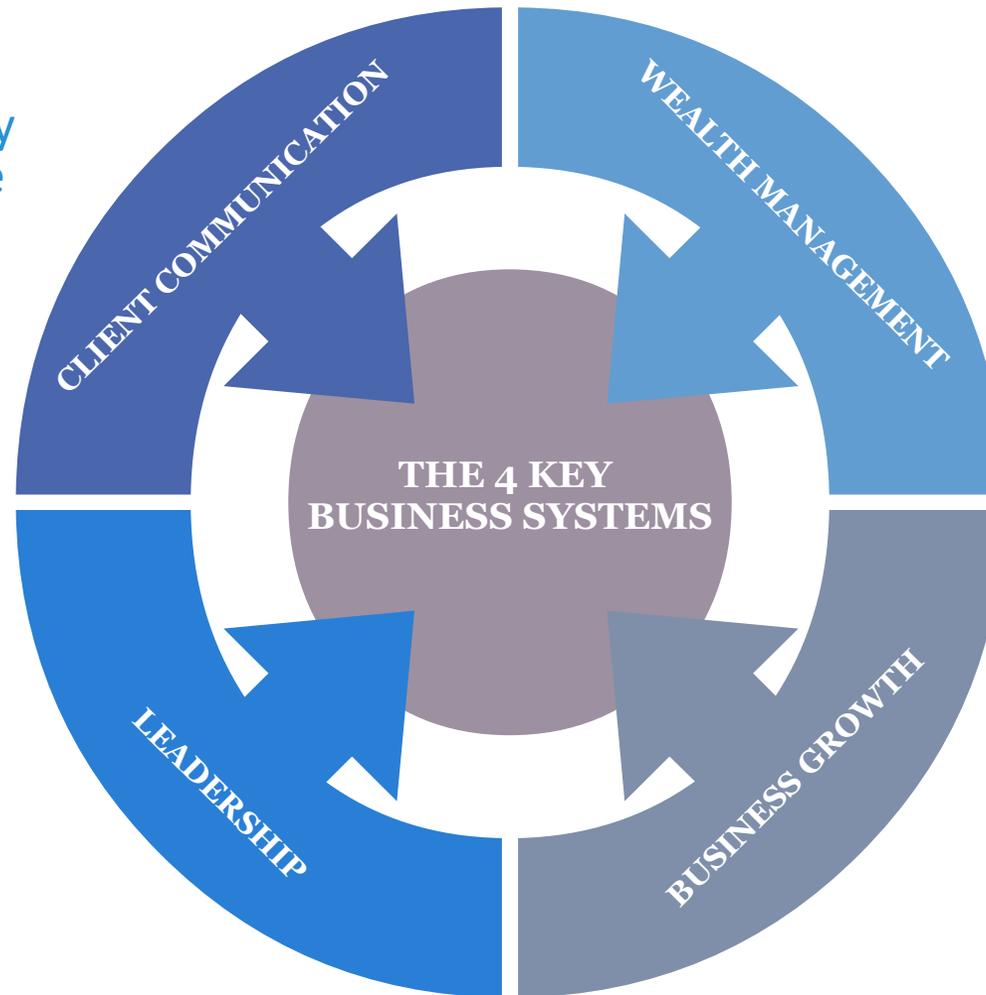
Data Summary

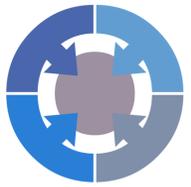
| Segment | % Relationships | # Relationships | Cumulative Assets | Cumulative Asset % | Cumulative Revenue | Cumulative Revenue % | ROA |
|---------|-----------------|-----------------|-------------------|--------------------|--------------------|----------------------|-------|
| Growth | 6.79% | 19 | \$44,919,338.43 | 32.45% | \$238,456 | 50.49% | 0.53% |
| Service | 25.36% | 71 | \$103,015,129.80 | 74.43% | \$378,549 | 80.15% | 0.37% |
| Anchor | 48.57% | 136 | \$14,536,355 | 10.50% | \$23,637 | 5.00% | 0.16% |
| Action | 27.86% | 78 | \$7,006,464 | 5.06% | \$4,616 | 0.98% | 0.07% |



The Cornerstone Systems

Building and customizing your business systems is the next phase of the engagement. Top performing advisors have four key systems in place that serve as the cornerstones of their business.



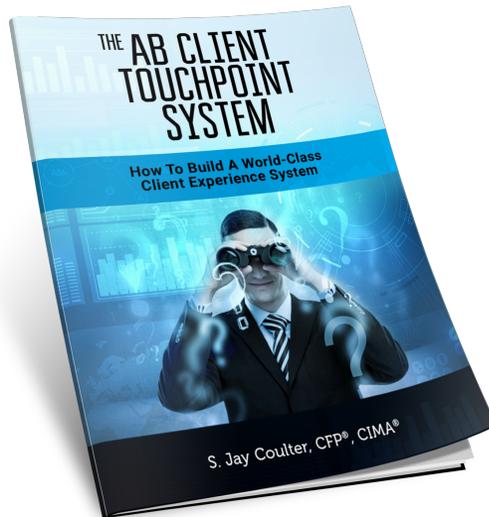


The AB Client Touchpoint System

Transforming Your Business With Simple Systems

The AB Client Touchpoint System is built and customized so that you and your team never miss another client touch.

Once the system is in place, you will never leave the office wondering if any of your clients are 'falling through the cracks.'



AB Touchpoint System

Month: **September**

| Business Touchpoint | Social Touchpoint | Service Touchpoint |
|---------------------|-------------------|--------------------|
| Client 3 | Client 1 | Client 9 |
| Client 9 | Client 2 | Client 21 |
| Client 12 | Client 4 | Client 33 |
| Client 15 | Client 6 | Client 45 |
| Client 18 | Client 7 | Client 57 |
| Client 21 | Client 8 | Client 69 |
| Client 25 | Client 10 | Client 81 |
| Client 33 | Client 13 | Client 93 |
| Client 39 | Client 14 | Client 105 |
| Client 42 | Client 16 | Client 117 |
| Client 45 | Client 17 | Client 129 |
| Client 51 | Client 19 | Client 141 |
| Client 57 | Client 24 | Client 153 |
| Client 63 | Client 29 | Client 165 |
| Client 69 | Client 30 | Client 177 |
| Client 75 | Client 36 | Client 189 |
| Client 87 | Client 48 | Client 201 |
| | Client 54 | Client 213 |
| | Client 66 | Client 225 |
| | Client 78 | Client 237 |
| | | Client 249 |
| | | Client 261 |

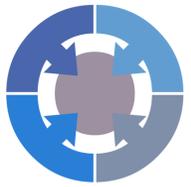
Business Touchpoints:

- Advocate Event
- Face To Face Review
- Phone Review
- Review Note
- Email Review

Social Touchpoints:

- Wow Gift
- Face To Face Event
- Personal Phone Call
- Person Email
- Digital (Social Media/Email)

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Wealth Management System

Transforming Your Business With Simple Systems

01

Are you able to explain 'Why' you are a financial advisor? The first step is to build that story for you.

02

We build a pitchbook that lays out your value proposition. The key ingredient is a branded process that you are then able to market.

03

Add rules-driven model portfolios grounded in behavioral finance.



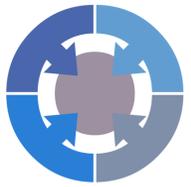
04

Development of a system to become a financial planning centered advisor.

What Is Your Story?

If you don't already have a unique story, pitchbook and process we will build that out for you. This process will get you excited about selling again!

We can also help you add rules-driven investment models to your process as well as empower you to pivot to a financial planning centered practice.



Business Growth System

Transforming Your Business With Simple Systems

Business growth requires a system. Each advisor has different needs, so we look at these 4 major growth drivers and customize a program for you.

COI Marketing Program 03

Industry data still shows that Center of Influence marketing drives results. We help you build a COI plan for long-term relationship building.

Digital & Content Marketing 04

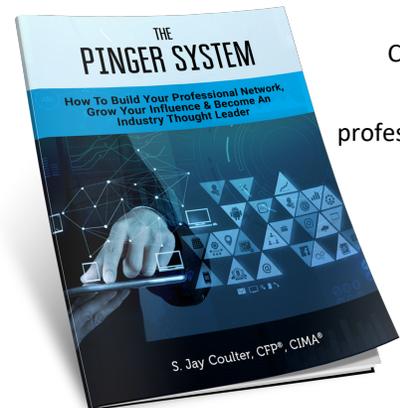
The advisor who is successful in the 2020's will have produced or shared content that shows thought leadership. That requires a system!

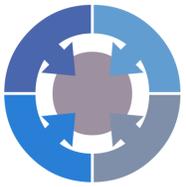
Building Your Niche 02

Research shows that advisors who have a clear niche grow exponentially faster than those who do not.

Relationship Management System 01

Create a standard process for staying connected with the most important contacts in your professional network. We call it The Pinger System.™





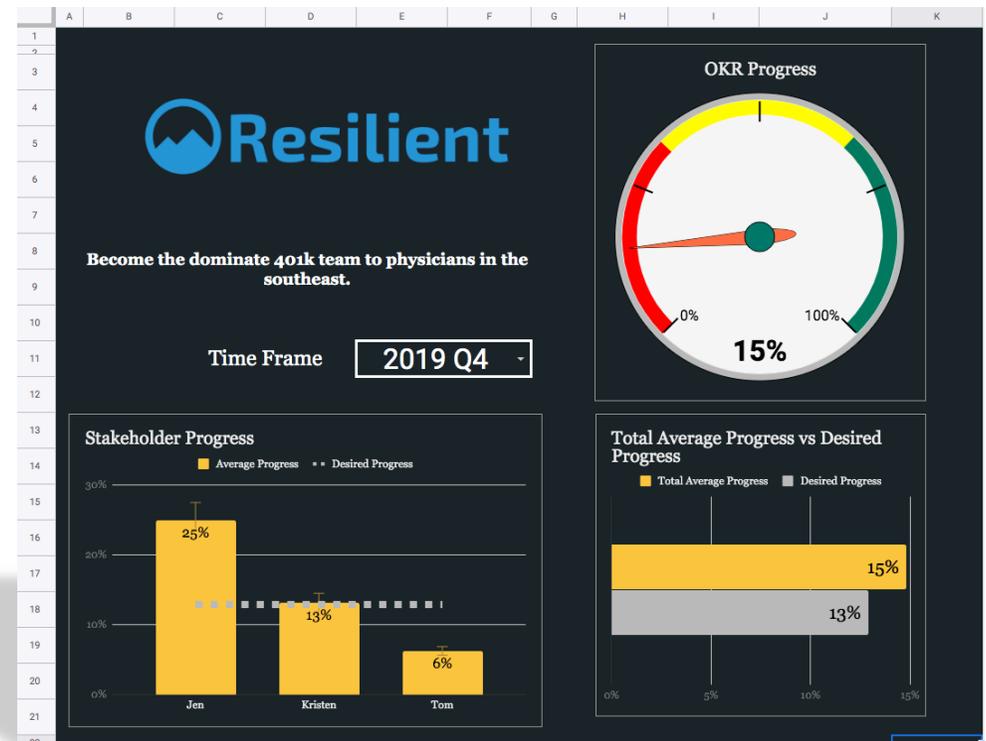
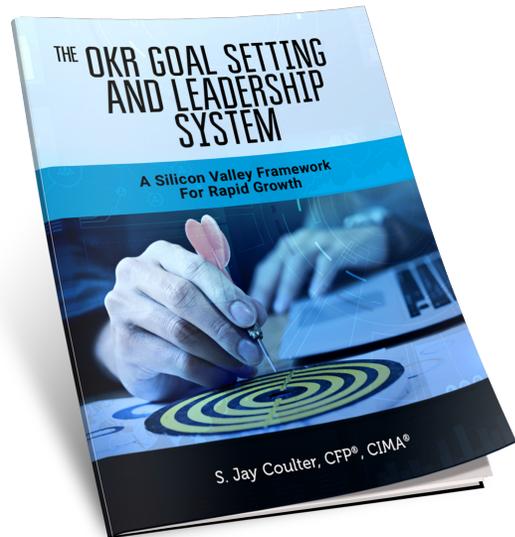
The OKR Leadership System

Transforming Your Business With Simple Systems

The #1 driver of successful advisors, teams and firms is leadership. Most practices struggle to find clarity, work as a team and achieve big results. I have customized the OKR System for financial advisors and this will be the mechanism that helps you lead your team and achieve your goals.

OKR System will help you:

- Focus & Commit To Priorities
- Align Teamwork
- Track For Accountability
- Stretch For Big Goals





Program Pricing

Transforming Your Business With Simple Systems

Cornerstone Program: \$1000 per adviser per month*

- 3-6 month consulting program
- Weekly scheduled calls/Zoom meetings with unlimited access between calls
- Unlimited access to Resilient Portfolio Models

Performance Coaching (Optional): \$500 per month**

- Bi-weekly scheduled calls/Zoom meetings with unlimited access between calls
- Unlimited access to Resilient Portfolio Models

* Multiple advisors will receive a 25% discount (\$750 per month)

** After the Cornerstone Program is complete



Engagement Tools

