The Million Dollar Foundation
Online Coaching Program

The New Advisor Challenge

There has never been a better time to start a career as a financial advisor. The number of individuals with over a million dollars in investable assets has never been higher, the intergenerational transfer of assets is staggering, aging baby boomers have a huge need for professional financial advice and the ability to source leads on-line has revolutionized the industry. Yet, ironically, despite this unparalleled opportunity, the majority of new advisors fail to meet expectations and eventually leave the industry.

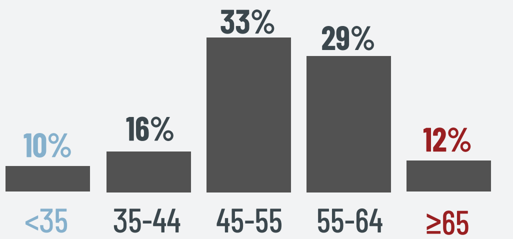
60-70% of new advisors leave industry within 3-5 years

Improving Retention, Seizing Opportunity

The inevitable retirement of aging financial advisors is creating a huge vacuum. Unless retention rates for new advisors improve dramatically, this will have serious repercussions for financial service organizations. Meanwhile, firms that address this challenge will be in a position to seize the greatest opportunity in a generation.

Current approaches to asset acquisition training are not enough. To support and grow their client base, financial service organizations need new strategies to reduce turnover and help advisors succeed in the profession. That's why Altius Learning developed a new on-line learning program that blends proven strategies with personalized coaching and real-world application.

Age range of financial advisors



*"**The program helped me narrow my focus.** My previous approach was to commit a little to a lot of areas. I narrowed down to 4 strategies that I can commit more time to and was a big improvement for me"*

ML | Pittsburgh, Pennsylvania

The **Altius Solution**

Altius Learning has provided personal coaching to top performing financial advisors for over ten years. Our **Million Dollar Foundation Online Coaching Program** makes the benefits of personal coaching accessible to new advisors by leveraging a mix of technologies and delivery methods to control cost while making optimal use of participants' time. The result is a scalable offering that can help firms improve productivity and retention rates for new advisors.

Our blended learning approach for success includes:

Self-Guided e-Learning

FAs complete mobile-friendly learning modules covering the fundamentals

Group Coaching

Regular small-group coaching sessions offer guidance on specific performance issues

Discussion Forums

Participants can discuss strategies and challenges with each other and ask their coach questions in real-time

Performance Tracking

Participants are held accountable for improving key metrics (leads, appointments, clients)

The Value of Our Coaching

The core of our blended learning offering is the group coaching component. Decades of experience confirm that coaching provides the needed accountability, reinforcement of the core skills and strategies, and relevant guidance to overcome the inevitable challenges that advisors face day to day. Nothing can replace an experienced coach to bridge the knowledge and implementation gap.

7 Essential Factors Of The Million Dollar Foundation

1 | Vision: Advisors must visualize what is required to build the foundation for a million-dollar practice. Our training provides new advisors with a proven blueprint to channel their talent, motivation and energy into creating a highly productive practice.

2 | Motivation: We deliver the tools needed to deal with the inevitable rejection that occurs when building a new financial services practice. The right mindset coupled with deep motivation is essential to building a successful practice.

3 | Goals: The foundation for a million-dollar practice, requires the right infrastructure. This includes the right combination of affluent clients, assets, velocity rate and prospects. We demonstrate how monthly and annual goals provide a time-line for building a million-dollar plus practice.

4 | Prospect to Client: Prospects are a financial advisor's future clients. In this segment, we show you how to convert prospects to clients. Most clients are under-served by their current advisor, so we position the new advisor to take advantage of this fact. We focus on the tactics required to build and maintain a strong pipeline of prospects.

5 | Market Action Plans: This segment shows advisors how to develop five market plans. This includes creating scripts, obtaining qualified names, and the approach to be used.

6 | Getting Appointments with Affluent Clients: The most important attribute an advisor can offer a prospect is trust. Building trust with affluent individuals begins with an initial face-to-face meeting. Our process has three essential components which will increase the contact-to-appointment ratio.

7 | Conducting Successful Appointments: We provide the four objectives advisors should use to get the most out of every appointment. We focus on asking the right questions to build rapport, gather information and obtain a second appointment.

The Altius Difference

Advisors succeed when there is consistent *execution* of fundamental acquisition strategies. The habits (good or bad) advisors build early in their career stick, and often explain success rates, retention, and ultimate performance. Recognizing this, our Million Dollar Foundation Online Coaching Program keeps advisors focused on the basics, while providing expert coaching, peer support and learning resources to help bridge the gap between knowing and doing.

Our Content

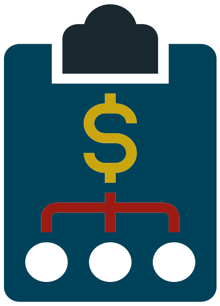
Our content is based on our industry experience, research and insights gained through years of coaching top performers. We understand how to make this expertise relevant and accessible to new advisors.

Research

We have observed, interviewed and worked with many of the most successful advisors in the industry. Our strategies have been validated through experience and help advisors adopt the habits of top performers.

Our Experience

Altius Learning's coaches have all achieved success as financial advisors and complex managers. Collectively, we have hired and trained thousands of new advisors.



Tactical Approach

We emphasize the "how to" aspect of our strategies and provide all of the necessary scripts and tools to help advisors successful implement our methods.

Elements of The Million Dollar Foundation Online Coaching Program

Objective

Increase the success and retention rate of new advisors.

Structure

The Altius online coaching offering is delivered in two distinct phases over 12 months. The first phase (months 1-6) is activity-based, focusing on building a strong prospect pipeline. The second phase (months 7-12) focuses on generating new assets and affluent clients, building on the foundation established in phase 1.

Complement Existing Training Programs

While it can stand on its own, our offering is designed to complement existing programs. We take a "70-20-10" approach, recognizing that 70% of learning is experiential, 20% comes through coaching and social learning, and only 10% from formal training. We also engage local leaders to take an active role in advisors' development.

Methods

The Million Dollar Foundation Online Coaching Program takes a "lean" approach to training and coaching, optimizing use of participants' time and controlling costs while delivering a significant impact on the success and retention rate of participants. Our system leverages a blend of proven methods, including group coaching, social learning / discussion forums, e-learning and accountability through online performance reporting.

Economics

We are confident that the Million Dollar Foundation Online Coaching Program can have a significant impact on participant success rates. Our view is that 40 percent of new advisors are in the movable middle that most likely will fail without coaching. We are confident that, through our blended learning offering, we can move at least 25 percent of the movable middle group from failure to success, as well as enhance the success of those who could otherwise make it on their own. Improving the overall success rate of the new advisor population by 10% has significant financial implications for firms that engage us.

Expert Instructors

Our instructors have been highly successful financial advisors and experienced managers. They posses 30+ years of experience in the wealth management industry. Our team has hired, trained and mentored hundreds of advisors, many of whom have built million dollar plus practices. Altius instructors know how financial advisors have built their businesses, and we share those best practices with advisors.

ON YOUR MARK.
GET SET.
GO!

If you're ready to build your Million Dollar practice, then the Altius Million Dollar Foundation System is your road map to success.

Integrate the seven essential factors of the Million Dollar Foundation program into your efforts and join the elite advisors that set the standards of achievement.

Here's What Advisors Are Saying About Altius Learning:

"The MDF Program is a terrific framework with specific, actionable ideas on how to run a business. *From business planning to service model to efficiencies to time management. The fact that the material is presented by people who have actually sat in the FA chair adds further credibility"*

J.S. | Financial Advisor
Houston Woodlands, Texas

"Thank you for putting together an invaluable process to become a Million Dollar Producer. *Smart basic building block ideas to implement in my business for fast growth and efficiency"*

P.W. | Financial Advisor
Morristown, New Jersey

"This is a marathon not a sprint. *I know that your plan is to start us out of the blocks at a strong gait. I appreciate all that you have done to help us continue to build our practice. We look forward to a tremendous amount of success as we continue to employ your tried and true training and coaching techniques."*

N.B. | Financial Advisor
Denver, Colorado

"Most valuable part of the program was the accountability. *Making sure we are progressing. I love the new criteria for having a true prospect (sitting with you and having a real financial conversation)."*

ML | Grand Rapids, Michigan

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