Advisory business development

Practice Management solutions for wealth managers and financial advisors to drive sustainable growth

Practice management that empowers growth by strengthening how practices lead, operate, and engage clients.

We help wealth managers, financial advisors, and plan sponsors grow smarter through a full-spectrum platform—combining practice strategy and execution, and investor acquisition and engagement.

The guidance is practical and actionable. Insights, frameworks, and considerations are built around two key areas: Practice Growth & Strategy, and Investor Intelligence & Engagement. Together, they power both sides of the growth equation: operational strength and client connection.

How we drive impact together

We work as an extension of your team, offering a strategic lens on your business to help you refine your strategy and execute with clarity.

- Anticipate emerging investor trends and behavioral patterns
- Apply segmentation, positioning, and planning-led frameworks to differentiate and scale
- Optimize business models by connecting internal execution with external expectations
- Enhance client engagement by showing how your value is felt, not just described

Our value to your business

- A platform blending global insights with real-time business consultation
- Built for execution through strategic planning, implementation frameworks, and co-developed solutions
- Enables consistent delivery of your value proposition—aligned to your segments, philosophy, and practice model
- Trusted by leading advisory firms, plan sponsors, and industry groups globally; recognized with eight industry awards

How to leverage practice management

- **Consult with us:** One-on-one strategic planning and implementation support
- **Access resources:** Business frameworks, playbooks, and peer-tested case work
- **Collaborate:** Joint activations, speaking engagements, and strategic partnerships
- **Engage digitally:** On-demand insights and self-service resources

Advance your practice, elevate your impact

Achieving sustainable growth isn't just about strategy—it's about execution. Whether you're refining your client experience, optimizing operations, or identifying new opportunities, we're here to help. Connect with your relationship manager or regional consultant to explore what's next for your business.

Our Practice Management approach is structured across two complementary tracks—one focused on building the business, and one on engaging the investor—together enabling sustainable growth.

Track I: Practice growth & strategy

Enhancing the capacity of growth and operational excellence

Strategic planning: Business planning resources focused on service model alignment, team structure, investment management philosophy, and operational strategy to succeed in today's landscape.

People power: Frameworks and consultative resources to strengthen leadership, define roles—including career paths for growth and earned practice equity—to enhance individual and team performance across delivery channels and client types.

Business continuity & succession: Strategic resources and planning support for succession readiness, continuity execution, and client relationship transitions—positioned as a core component of business growth and long-term planning, not just an exit strategy.

Scaling with intention: Planning and implementation support to scale delivery through integration of model portfolios, advanced client segmentation, and omnichannel enablement (connected digital + human channels)—aligning value proposition and investment philosophy to ensure scalable delivery reflects the practice's core beliefs and differentiators.

Track II: Investor intelligence & engagement

Elevating how to engage with and service today's investor

Influential investors: Segment-specific guidance, engagement strategies, and positioning support grounded in demographic, attitudinal, and behavioral insights to deepen relevance and gain wallet share.

Investor behavior: Behavioral finance content, coaching techniques, and communication frameworks to align planning and portfolio decisions with how clients think and act—reinforcing the advisory relationship as both strategic and personal.

Investor education: Client-ready content and planning materials to help clients understand their investments, articulate their goals, and build resilience—translating financial outcomes into meaningful progress toward clients' goals across generations.

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