

Advisor Solutions Network

Raise the Trajectory of Your Business!



Advisor Solutions Network :: ASN360.com



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about the ASN

Advisor Solutions Network

the ASN is a consortium of **coaches** and **consultants** who work together to meet the increasingly complex needs of financial advisors. our mission for 2010 is to help advisors **GROW** their businesses.

we work with three types of clients:

- [1] financial advisors
- [2] institutions that employ or support advisors
- [3] investment firms that market to advisors

our **collaborative business model** enables us to address a wide range of issues for advisors and the institutions that serve them.

our **knowledge** and **experience** sets us apart from other coaching and consulting firms.



experience matters !

Advisor Solutions Network

the ASN provides access to some of the most **knowledgeable** and **experienced** coaches and consultants in the financial services industry...

core team

Steve Barger, Managing Partner / Birmingham, AL

Kathryn Hayden, Managing Partner / Houston, TX

Steve Saenz, Managing Partner / Atlanta, GA

Kathleen Ferguson, Consulting Partner / Danbury, CT

Marty Jensen, Consulting Partner / Los Angeles, CA

Irene Marom, Consulting Partner / Alpine, NJ

board of advisors

Casey Cleland, SH Partners Management / Vancouver, BC

Sydney LeBlanc, S. LeBlanc & Company / Carlsbad, CA

David Loeper, Wealthcare Capital Management / Richmond, VA

Spenser Segal, ActiFi / Minneapolis, MN

Linda Stimac, ING Financial Network / Los Angeles, CA

Ron Surz, PPCA / San Clemente, CA

Marie Swift, Impact Communications / Kansas City, KA

Steve Winks, Stephen C. Winks & Associates / Richmond, VA





collaborative business model

Advisor Solutions Network

our collaborative business model enables us to address a broad range of issues for financial advisors and the institutions that serve them...

clients are at the center of our business. our clients include individual financial advisors, the institutions that serve advisors and investment firms that market to advisors.

consulting partners are responsible for developing business, managing client relationships and delivering our products and services.

board of advisors provides feedback and guidance to the consulting partners.

alliance partners provide solutions that are complementary to our own. We outsource work to these partners as client needs dictate.

strategic partners provide us with products or services that are complementary to our own. we typically work with these companies in a Value-Added Reseller (VAR) relationship.





our **alliance** partners

Advisor Solutions Network

AK Advisory Partners provides advice and training to firms and individual advisors operating in the fee-based, investment management and wealth management areas. The firm offers a suite of consultative and training solutions designed to address business challenges and unlock real value.



Firepower Business Catalyst empowers independent business owners and their teams by engaging their personal and collaborative strengths toward a shared vision that will fire-up their unique business offering and achieve lasting success.



Impact Communications is a full service marketing communications firm serving a select group of independent financial advisors, industry thought leaders and allied institutions. Impact Communications serves independent advisory firms and the institutions that support them.



Plan Your Legacy provides products and services to financial professionals who wish to offer legacy planning to their clientele. Breadcrumbs is a turn-key legacy planning program that provides financial advisors with training, unique tools and ongoing education.



PPCA creates innovative and practical decision tools for financial advisors and the institutions that serve them. Their products, which focus on mission critical aspects of the investment consulting process, include PODs, StokTrib, Style Scan and Target Date Funds



Rose Communications specializes in the writing of promotional brochures, white papers, shareholder communications, magazine and newsletter articles, and management and marketing letters.

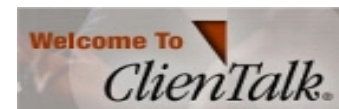


Sydney LeBlanc is an award-winning communications professional who specializes in the financial services industry. S. LeBlanc and Company offers a number of services including Streetwise Advisors, a third-party marketing tool for successful financial advisors.



Turning Point is a consulting and executive search firm that provides quality, independent recruiting, executive search and consulting services to financial service institutions.

The Barger Group offers innovative tools that empower financial advisors to build stronger and more profitable relationships with their clients. The firm's tools include ClientTalk and Investor DNA, both of which are available through the Advisor Solutions Network.





175 years of **target practice**

Advisor Solutions Network

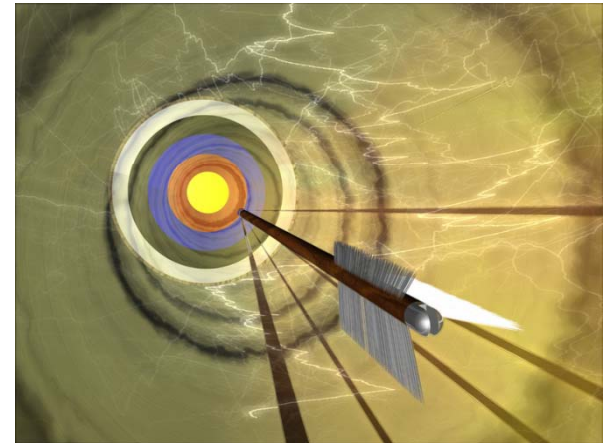
if **practice makes perfect**, you will be hard-pressed to find solutions that are more effective than those listed here.

collectively, our core team has more than **175 years of experience** helping advisors hit their marks...

ClientTalk™ is a **client survey tool** that uncovers break-through insights about an advisor's client relationships and service model.

Investor DNA™ is an **investor profiling tool** that provides financial advisors with valuable insights about investor personalities.

Referral Builder System™ is a **time-tested marketing system** that helps advisors get more and better referrals from clients and centers of influence [see slide 9]





stand out from the crowd

Advisor Solutions Network

how do you **differentiate** yourself in a world where everyone looks the same to the customer? the *Advisor Solutions Network* stands out from other consultancies in many ways. more importantly, **we can help you** [your firm] stand out from your competition so that clients will make the right choice...



coaching – we offer **results-driven** coaching programs for financial advisors and the institutions that serve them.

consulting – our **unique business model** allows us to address a broad range of issues for advisors and institutions. [see next page]

speaking & training – our team has been designing and delivering **high-impact presentations** and training programs for decades.

Dynamic Wealth Management™ – a powerful system for financial service organizations that want to create a **competitive advantage** for their advisors.



our **sweet spots**



Advisor Solutions Network

advisors

business optimization
coaching
client advocacy / loyalty
hiring & selection
managed accounts training
marketing plans
public relations
referrals
team development
wealth management

institutions

advisor loyalty
executive search
coaching
consulting
managed account training
practice management
public relations
strategic planning
team development



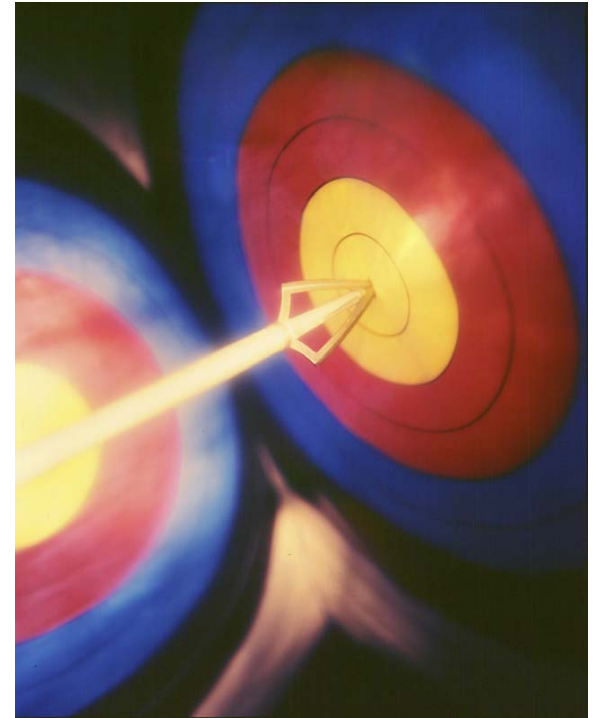
referral builder coaching

Advisor Solutions Network

referral builder is a time-tested coaching program that enables financial advisors to get **more** and **better referrals** from existing clients and COIs.

it is a powerful **loyalty system** that enables advisors to turn clients into **advocates** on consistent and deliberate way.

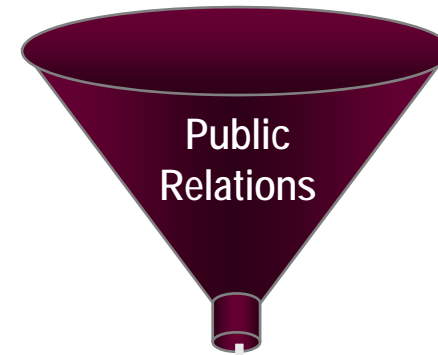
this program **transforms** advisors and their practices in a meaningful way.



maximum **impact** marketing = right **story** told to the right **people** using the right **strategies & tactics**



advisor practice **architecture**



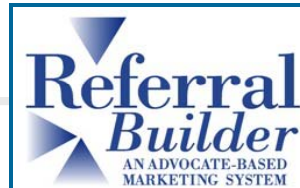
Discovery Meeting

Analysis & Planning

Wealth Mgmt Roadmap

Roadmap Implementation

Progress Meetings



Client Communication Plan

Client Education System

Client Feedback System

Client Appreciation & Recognition



contact us

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asn360.com

thank you for your time

please let us know how we can
help you or your organization

