

Dynamic Practice Management

Raise the Trajectory of Your Business!

Advisor Solutions Network

ASN360.com

What is Dynamic Practice Management?

Dynamic Practice Management (DPM) is a results-driven program that helps financial advisors optimize their businesses.

The goal of business optimization is to raise the trajectory of your business while, at the same time, decreasing the amount of time and effort it takes to manage your business.

The concept is similar to portfolio optimization, which seeks to maximize returns and minimize risk. Business optimization seeks to maximize business results and minimize the effort it takes to achieve those results.

The key to optimizing your business is to create leverage and efficiency. You do this by applying the right strategies and implementing the right systems...

Key Deliverables

The next slide shows what your client-facing systems might look like after going through the Dynamic Practice Management coaching program.

Every practice is unique so your specific strategies and systems might be slightly different.

We strongly suggest that you limit your practice to three core marketing strategies, one of which is Client / COI Referrals.

One of the key elements of this program is the **Referral Builder System™**, which is an advocate-based marketing system that will help you get more and better referral from existing clients and centers of influence.

Another is the **Dynamic Wealth Management™**. This proprietary process will help you differentiate yourself and deliver an exceptional client experience on a consistent basis. You will be given the right to use the term Dynamic Wealth Management as a result of participating in this program.

ClientTalk® is a web-based client survey tool that provides you with break-through insights about your clients and your own service model;

InvestorDNA™ is a powerful tool that helps you understand the “investor personality” (behavioral tendencies) of your clients and prospects. InvestorDNA, which is not available to the general public, has been used by advisors as an effective prospecting tool.

Your **Loyalty Process** is one of the most important elements of your wealth management practice. This allows you to turn more clients into advocates, which in turn leads to more referrals as indicated on the next slide...

Dynamic Practice Management: Client Facing Systems

Your core Marketing Strategies drive qualified prospects into your pipeline



Our Dynamic Wealth Management Process differentiates you from your competition



Our Loyalty Process turns your clients into advocates, which leads to more referrals



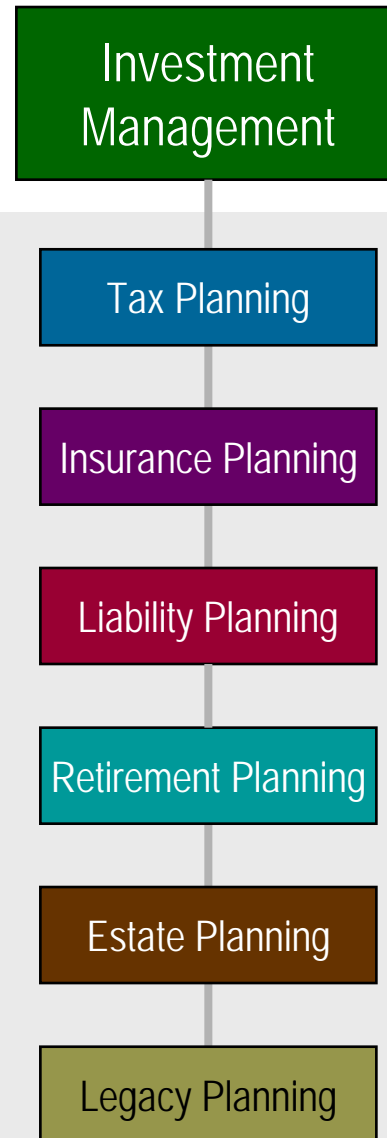
What is Dynamic Wealth Management™?

Dynamic Wealth Management is a process that enables wealth advisors to differentiate themselves while delivering an exceptional client experience. Advisors who employ our proprietary process...

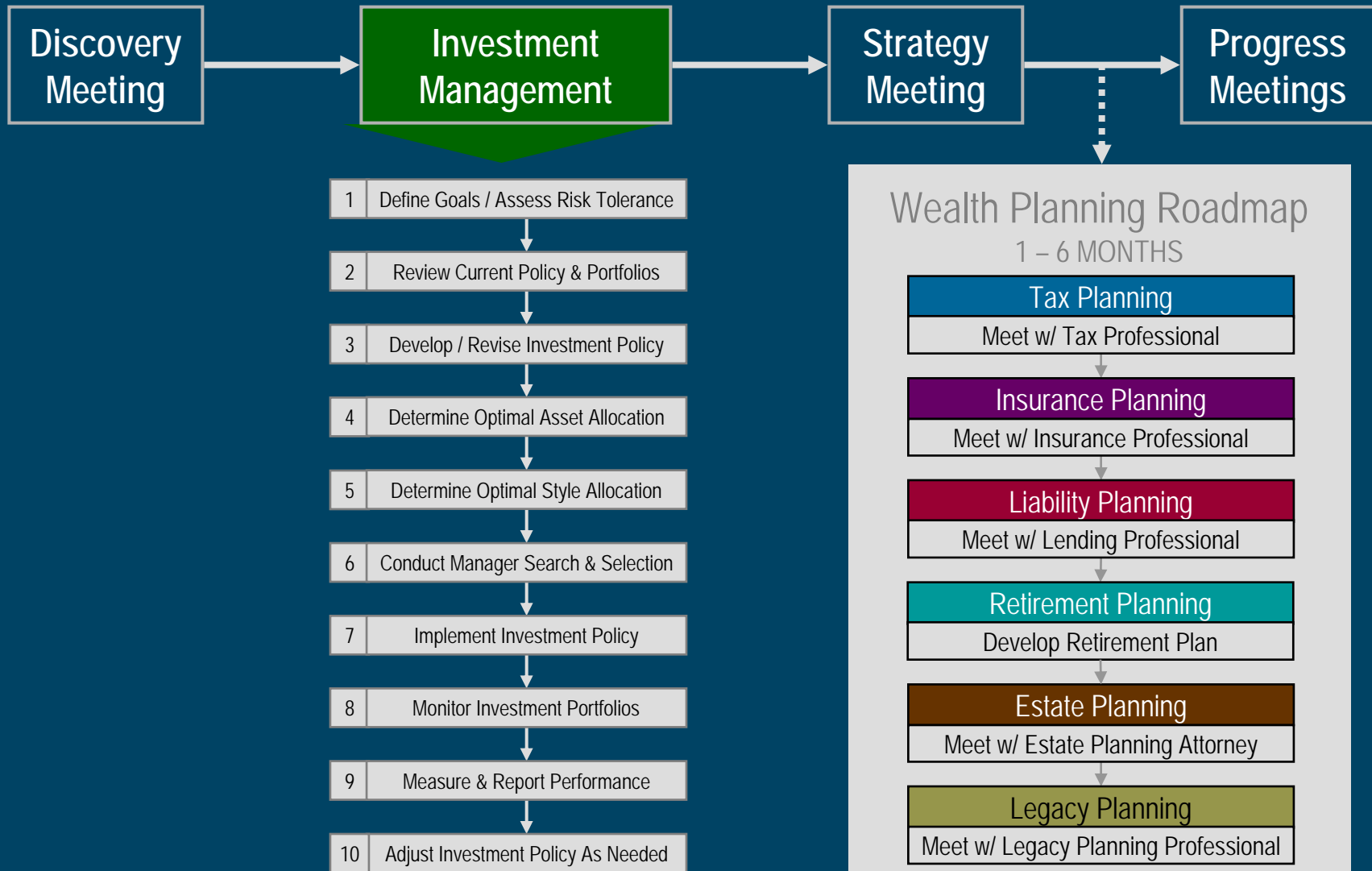
- Take a **proactive** approach to building and preserving intergenerational wealth for affluent families;
- Develop **comprehensive** plans that address the Seven Dimensions of Dynamic Wealth Management;
- Develop and implement **innovative** strategies that optimize wealth accumulation and preservation;
- Establish **collaborative** partnerships with other professional advisors;
- Create **customized** roadmaps for their clients that enable them to implement their wealth management strategies;
- **Monitor** their clients' wealth management plans continuously and make adjustments as needed.

Seven Dimensions of Dynamic Wealth Management™

1. **Investment Management** – constructing and dynamically managing customized investment portfolios that seek to achieve your long-term goals within acceptable risk levels
2. **Tax Planning** – employing **proactive** tax strategies that seek to minimize the impact of federal, state and local taxes in all areas that affect your family's wealth
3. **Insurance Planning** – ensuring that all of your assets are adequately protected; potential **risks** are identified and mitigated or transferred in the most cost-effective way possible
4. **Liability Planning** – proactively managing the **liability** side of your balance sheet to ensure that all debt is structured in the most cost and tax efficient way possible
5. **Retirement Planning** – ensuring that you have adequate funds available to support your **retirement lifestyle**; includes cash flow management to ensure that you are utilizing your assets as efficiently as possible
6. **Estate Planning** – ensuring that your estate is structured in such a way that it will pass on to your heirs in the most **tax-efficient** way possible; documents are up-to-date and adequate liquidity is in place
7. **Legacy Planning** – employing your wealth to build a lasting and meaningful **legacy**; usually goes beyond taking care of your heirs and their families

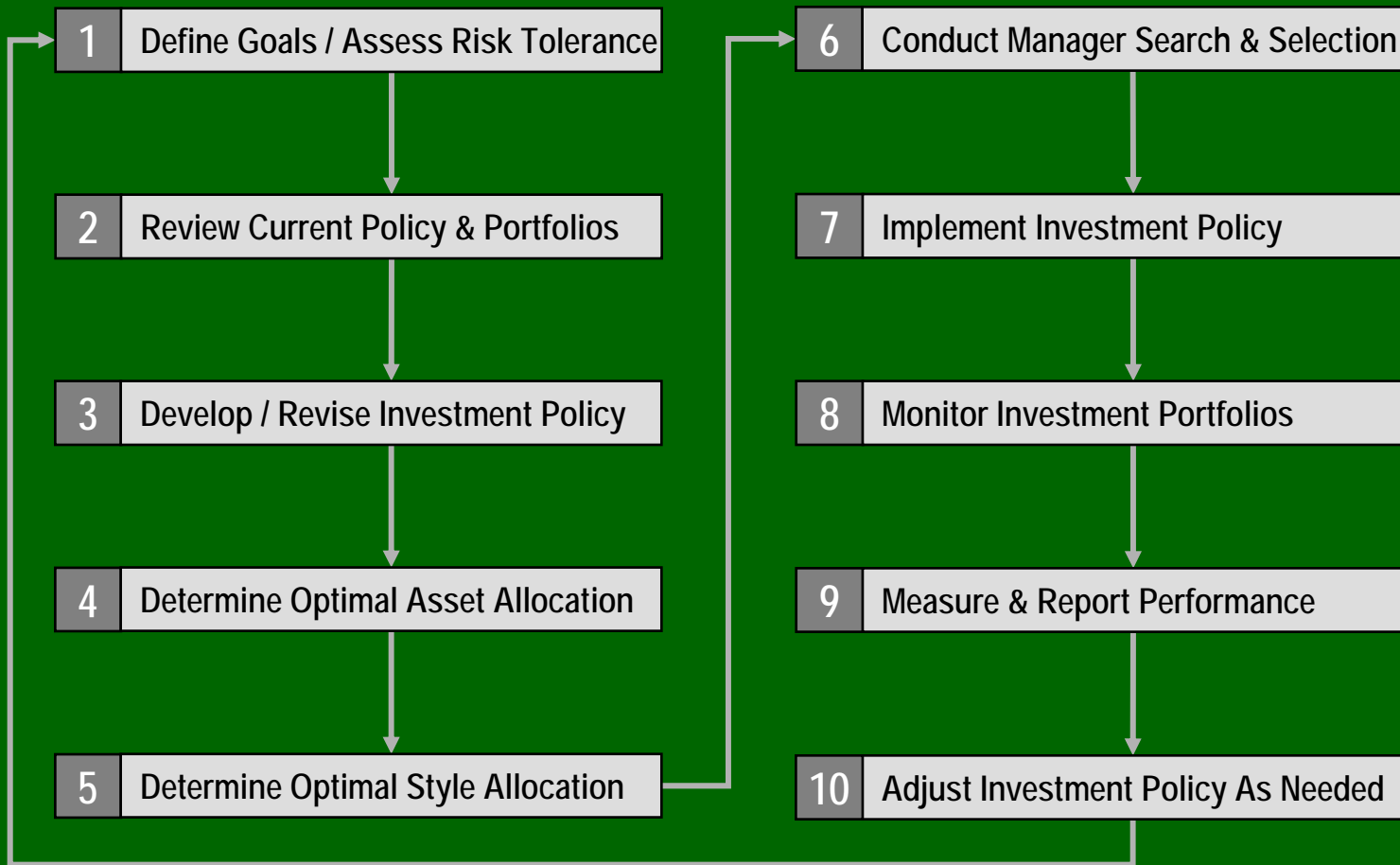


Dynamic Wealth Management™ Process



This is a sample only. Your process will be customized to your particular practice.

Investment Management Process Detail



This is a sample only. Your process will be customized to your particular practice.

Dynamic Wealth Management™ Roadmap

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

Investment
Management

Tax
Planning

A key deliverable of the Dynamic Wealth Management Process is that you will be creating a personalized Wealth Management Roadmap like this for each of your clients.

Insurance
Planning

Retirement
Planning

Liability
Planning

Estate
Planning

Legacy
Planning

Next Steps

- *Dynamic Practice Management* and *Dynamic Wealth Management* were created by Steve Saenz, founder of the Advisor Solutions Network.
- If you are interested in learning more about what we do and how we do it, please contact Steve at: steve@asn360.com
- You can also visit our web site at: ASN360.com



Thank you very much.