

Tools to Grow Your Business

Institutions who offer investment products and services to financial advisors have repeatedly asked for Excella's help in providing them with advanced practice management solutions to deliver as a value-added offering to advisors.

In response, we offer you **AdvisorPower Business Building Toolkits**, a set of actionable educational guides and workbooks designed to empower financial advisors with institutional-quality expertise and help them grow and manage a thriving practice.

Through **AdvisorPower Business Building Toolkits**, advisors immediately leverage Excella's decades of success delivering solutions to leading high-net-worth and institutional firms.

At the same time, your organization benefits in several ways:

- Increasing its brand recognition among a broader audience of advisors
- Building a larger and more loyal base of clients
- Enhancing its reputation as a provider of actionable education that helps advisors achieve profitable growth
- Delivering solutions in a cost-effective manner

Available to your firm in PDF format, each **AdvisorPower Business Building Toolkit** includes robust educational content and a workbook that helps advisors develop and execute effective plans with focus and discipline.

Distribution Is Easy

1. Email the PDF toolkit to advisors
2. Post it on your firm's password-protected "advisor only" Internet site
3. Deliver a printed copy during one-on-one meetings

All Types of Firms Benefit

- Asset management firms
- Brokerage firms
- Independent broker/dealers
- RIA custody providers
- Specialty service providers



Upcoming Toolkits

**Building Client Loyalty
Five Strategies to Assess and
Deliver on the Priorities of Your
Key Constituency**

**Producing Marketing Results
Ten Ways to Select and Implement
the Best Strategies for Your Practice**

Available AdvisorPower Business Building Toolkits

**Building a Powerful Platform For Growth
Ten Steps to Cultivate
Center-of-Influence Relationships**

The most successful firms have multiple referral platforms.

Referrals from existing clients are essential, but they're not sufficient. In order to experience long-term, profitable growth in today's highly competitive marketplace, advisors must develop extensive relationships with professionals – attorneys, accountants and others – who are “centers of influence.”

Our center-of-influence (COI) toolkit empowers advisors to do the following:

- Identify and evaluate professional referral sources to support their practice
- Learn and implement the most effective strategies for building COI relationships
- Develop actionable plans that will enable them to achieve their goals

Get Started Today

Contact an Excella representative:

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