Advisor Business Mastery

Powered by MODEL FA

Advisor Business Mastery is an exclusive, one day, hands-on workshop that helps advisors build a business that's primed for growth in alignment with who they are. By the end of the workshop, participants get:

- An understanding of their business development temperament
- A list of business development strategies best suited for who they are
- Marketing blueprints for success in a specialty niche
- Tools for accelerating trust with prospects and clients
- A referral development method that is effective and enjoyable

Why Advisor Business Mastery?

Every financial firm in the industry faces the same hard problems:

- Developing a marketing strategy
- Differentiating firm from competitors
- Converting prospects to clients
- Finding or developing rainmakers
- Recruiting and hiring qualified employees
- Developing employees
- Rising average age of client base
- Improving profitability

This list has stayed the same for the past decade — and these issues will continue to stand in the way of growth, unless advisors find a way to solve them. Advisor Business Mastery is designed to be the catalyst for reframing how advisors think about and address these challenges in their own practices.

Workshops

Decipher Your Advisor DNA

Presented by Patrick Brewer

There are many ways to be wildly successful as a financial advisor. This session is designed to answer the pivotal question: Which way will be effective and sustainable for you and your team? Patrick Brewer explores Advisor DNA, our proprietary personality system that holds the key to practice growth and long-term advisor success. Discover your own Advisor DNA so that you can boost business and client development for yourself – or audit the makeup of your team to align your recruiting, training, and incentive decisions with the personalities of your advisors.

Business Development on Autopilot

Presented by David DeCelle

Imagine ending each day with a sense that you have spent your time doing what matters most, both professionally and personally. In this hands-on session, David DeCelle defines what it takes to win the day and shares the tool that he uses to create momentum, build great habits, and create impact in business and in life.

Accelerating Trust with Exponential Relationship System

Presented by David DeCelle

Every advisor is in the business of relationships. The challenge is that accumulating trust takes time and focus – which is why most advisors never develop an intentional, strategic process for moving their connections from acquaintance, to lead, to new client, to loyal client, and finally to raving fan. In this session, David DeCelle introduces the Exponential Relationship System, a step-by-step method for building trust, relevance, and influence with your audience.

Discover Your Zone of Genius

Presented by Patrick Brewer

The secret to building momentum in your practice is not "just" hard work. Join Patrick Brewer as he guides the audience through an Energy Audit, a revolutionary method for thinking about advisor productivity. Reimagine your planning and workflows to better align with your Advisor DNA – and inject energy and intrinsic motivation into your day.

Unlocking Growth with Specialization

Presented by Patrick Brewer

Specialization and niches have been the talk of the industry for decades – and yet, many advisors approach this decision in a way that sabotages the potential of their practice. Join Patrick Brewer as he explains the common mistakes advisors make in defining their ideal client and building their go-to market strategy. The audience will test their personal fit with two popular niches using our proprietary Niche Maps and Client Decision Journeys.

The Psychology of Referral Marketing

Presented by Dan Allison

If you have ever wished for more high-quality client referrals, this session is for you. For the past 20 years, Dan Allison has believed that clients are the best consultants a financial advisor could ever hire. The only thing missing was a comfortable, professional process for engaging those clients in the advisory business and its growth – and so Dan created Feedback Marketing. Since then, the Feedback Marketing system has been taught from hundreds of stages and in conference rooms across the world – and has generated thousands of new clients for the advisors who have integrated Dan's simple process into their businesses.

Workshop Impact

“Where do I begin? If you are looking for a speaker who’s going to educate, connect, and move your audience, I would highly recommend Patrick Brewer. I appreciate how he explained the information in a detailed yet simple manner. We are thankful for his expert marketing knowledge and for Patrick taking the time to share it.”

-Kevin Tiernan, Regional Director, Dimensional Fund Advisors

“In a world of procrastination and lip service, David is a champion of doing. His ability to communicate, encourage, and guide others to do the same is a welcome and refreshing change. I highly recommend working with and hearing from David.”

-Ben Lee, Marketing and Business Process Strategist

“Dan’s presentation energized our entire team. We have just started the implementation of the Interactive Surveys with our clients and have had a great response. This is an approach to new business development that our people are embracing. The conversations we are having with our clients are all positive, and even our most experienced and successful advisors are excited about the opportunity. I strongly recommend Dan to anyone in our industry who is interested in deepening their relationship with their clients and growing their business.”

-J. Christopher Kerckhoff, Jr., CFP®, AIF®, President Plancorp, LLC

Speakers

Dan Allison

Dan Allison knows how to get your clients talking — to you and about you. As the creator and chief evangelist of the Feedback Marketing method, Dan has developed a client engagement process that can double or even triple your current referrals and introductions. Dan has taught thousands of industry professionals how to use his behavioral-based process to turn clients into enthusiastic and convincing referral sources. Dan also serves as the managing partner of Brokers Clearing House (BCH), a company that connects fiduciary financial advisors with the best insurance solutions for their clients' needs. Dan's book, "Feedback Marketing How to Duplicate Clients, Attract Prospects, and Create Advocates... Without Talking," is available on Amazon and wherever books are sold.

David DeCelle

David DeCelle is the President of Model FA, leading a talented team on a mission to serve thousands of advisors all over the world. David is passionate about helping advisors create a memorable client experience to build a client base of raving fans that willingly and proactively give referrals.

Patrick Brewer, CFA

Patrick Brewer is on a mission to equip financial advisors with the knowledge and the tools they need to grow and thrive. He is the founder of Model FA, a complete coaching and consulting platform dedicated to financial advisor success. Patrick is passionate about helping advisors optimize their marketing strategy, solve tactical problems that stand in the way of exponential growth, and reach their full potential.

Contact Us

Ready to explore what a focused, dynamic Advisor Business Mastery workshop can do for you?

Email David DeCelle to get started:

David@ModelFA.com