



Systematize & Grow Your Practice



THE MINDSET METHOD

Mindset Consulting is pleased to offer you a comprehensive, Best Practices Group Learning Program that will help you **completely systematize and meaningfully grow your business**, giving you perfect vision for this year and well beyond. This program is perfect for the entire team.

This program doesn't just have you **doing things differently**, it has you **thinking differently**. This is a major factor in why this program will serve you for the rest of your career.

This program is best suited for advisory teams who are motivated to implement a full suite of best practices to enhance and grow their business by delivering an exceptional client experience. This is achieved through full integration of people, process & technology.

OUR 4 PILLAR PROCESS

The Mindset Method foundation is built on our fundamental 4 Pillar Process:

- Pillar 1: Client Analysis
- Pillar 2: Client Experience
- Pillar 3: Client Onboarding
- Pillar 4: Client Rebranding

CE CREDIT ELEGIBILITY

The Mindset Method Program qualifies for:

- 22 FP Canada-Approved CE Credits (17 Financial Planning & 5 Practice Management)
- 24 IIROC-Approved CE Credits (20 Professional Development & 4 Compliance)

CE Eligibility is based on completion of specific criteria provided to program participants.

3 METHODS OF PARTICIPATION

Concierge Coaching

One-on-One Virtual Coaching with your dedicated Mindset Consulting Business Coach.

Online Dashboard Access

Program Duration 1 Year

Cost \$15,000



Space is limited

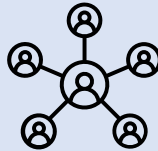
Group Coaching

One-to-Many Coaching led by two Mindset Consulting Coaches in a group setting.

Online Dashboard Access

Program Duration 6 Months

Cost \$2,500



Available in collaboration with specific firms

On Demand

Self-Paced, independent on-line learning at your convenience.

Online Dashboard Access

Program Duration Varies

Cost \$550



Available online anytime

WHO BENEFITS FROM THIS PROGRAM?

This program is best suited to advisors who want to achieve any one or more of the following:

- Create strategic growth through meaningful client analysis and a proactive client experience
- Systematize their entire practice through organizing process, people & systems
- Leverage client advocacy through unique onboarding and exceptional servicing of clients
- Strengthen relationships with top clients to generate increased business engagement & advocacy
- Improve your overall branding as it relates to value and consistency
- Reduce stress and frustrations by aligning people, process, and technology
- Reinvigorate your practice and make what you do enjoyable again
- Create a sustainable business model in preparation for future succession planning

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