

CREATING A TRUSTED ADVISOR NETWORK FOR BEST PRACTICES & GREATER CLIENT VALUE

TRUSTED ADVISOR PROGRAM



Benefits of Membership

Monthly Meetings

- Connect with eight to ten trusted advisor peers from a diverse range of businesses and backgrounds for challenging discussions, broader perspective and strategies to help drive results for your clients
- Build confidence and gain new insights into the trusted advisor relationships with clients
- Get confidential feedback on your toughest challenges
- Each member prepares an annual Strategic Map on their business and their life and receives pointed, intelligent, outside-the-box feedback
- Meeting with other owners and leaders gives you the opportunity to work *ON* your business, not just *IN* your business.

Our mission is to strengthen businesses and enrich the lives of people who run them.

Why a Trusted Advisor Roundtable?

People prefer to get what they need from people they trust

Trusted advisors are more likely to open new lines of communication, have their advice taken, gain referrals and have more effective, positive relationships with clients

Having a group of peers to draw from, lean on and pick the brains of is an antidote for the isolation business owners face

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