1QA Business Coaching FAQ

HOW MUCH DOES IT COST?

Registration Fee: $800
(includes Discovery & Retreat fees)

Monthly Fees:

Regular Price	$950/mo
GFWM Advisors	$875/mo
GFWM PC	$800/mo
GFWM Gold PC	$750/mo
GFWM Platinum PC	$700/mo

Participant pays travel and lodging for retreats.

HOW LONG IS THE PROGRAM?

Program Length: 2 years

Engagements are at-will, are renewed quarterly, and may be cancelled by providing 30 days' written notice.

HOW MANY PARTICIPANTS ARE IN THE GROUP?

Group Size: 25 maximum

WHO SHOULD PARTICIPATE?

Financial Advisors ready to become a 1QA – a"Top-Quartile Advisor" – one of the top 25% of advisors in owner income and profits. These Advisors are looking for a clearly defined plan of action and who know it is time to drive growth and development in a way that holds them accountable and delivers results.

This program is specifically designed for Advisors that want:

- A clear vision for their business
- To consistently deliver a world-class experience to their clients
- A steady stream of ideal prospects
- More control of their time – personally and professionally
- To leverage technology and systems to improve business performance
- Effective plans to hire, retain and reward talented staff
- An efficient, sustainable, profitable business

WHAT IS INCLUDED?

Discovery
Prior to the first retreat, we will provide Advisors with Discovery materials which will allow us to conduct a baseline assessment of their firm's strengths and challenges while identifying the overall objectives they hope to achieve through participation in 1QA Business Coaching.

Coaching Retreats
Three retreats per year, $1\frac{1}{2}$ days in length, providing education on best practices strategies and solutions.

Group Coaching Call
Best practices strategy and implementation review. 1 call per month, 60 minutes in duration and conducted via conference call. Calls will be recorded to allow for play back. All Group Coaching Call dates are to be determined.

One-on-one Coaching Call
Individualized consulting support, work review and strategy discussion with Business Coach. 1 call per month, 60 minutes in duration. Individual calls are scheduled each quarter in advance to ensure availability.

Access to Business Tools
Ongoing access to interactive tools, modules and libraries.

(866) 469-3675
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ARE ALL OF THE GROUP PARTICIPANTS MY "PEERS"?

No, we do not pre-screen participants and instead appreciate the varied business models and experiences that we find in a varied group. We always work to ensure that no single Advisor (large or small) monopolizes the retreat time and instead work to provide a forum where Advisors can benefit from and share their own experiences. Ultimately, the group program is designed to allow each participant to customize and develop the tools and solutions specifically for their organization.

WHAT MAKES THIS PROGRAM DIFFERENT FROM OTHERS?

The difference with this program is the focus we have put on implementation and driving real change in each participant's firm. We believe that it takes more than just drafting documents to truly change and better an organization. By ensuring that participants have a plan for integrating and using the solutions on a day-to-day basis, change will occur and ultimately drive growth and a better, more profitable business. Additionally, because the participants are working through each of the solutions in the curriculum in a structured, organized way, they will be learning how to continue the process of building a better business and realizing goals long after this program has concluded.

WILL I HEAR ABOUT PRODUCTS OR BE "SOLD" ANYTHING?

No. The program is focused on providing solid, practice management and business development tools and solutions which can help improve the overall performance of an organization, regardless of what platform or product they use. There will be no discussions about products.

IS THIS A "NEW" GROUP PROGRAM?

No, this isn't a "new" program. Quantuvis Consulting has successfully completed many group programs in the past. The content has evolved over the years as we (Quantuvis) have worked in the trenches with some of the best firms in the country, and has been revised to include some of the very best solutions from Genworth Financial Wealth Management's industry-recognized Mastery Program®. Ultimately, participants will have access to the same tools, materials, samples and business intelligence that are in use with private clients.

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