

# 1QA Business Coaching

*Helping Advisors Build Great Businesses™*



## WELCOME TO 1QA BUSINESS COACHING

Are you ready to become a top performing Financial Advisor? Are you looking for a clearly defined plan of action? Is it time to drive growth and development in a way that holds you accountable and delivers results? If so, 1QA Business Coaching is for you.

This coaching program combines the experience, best practices, proprietary research and proven tools of practice management innovators Genworth Financial Wealth Management and Quantavis Consulting. This uniquely powerful partnership can put your firm on the path to becoming a 1QA.

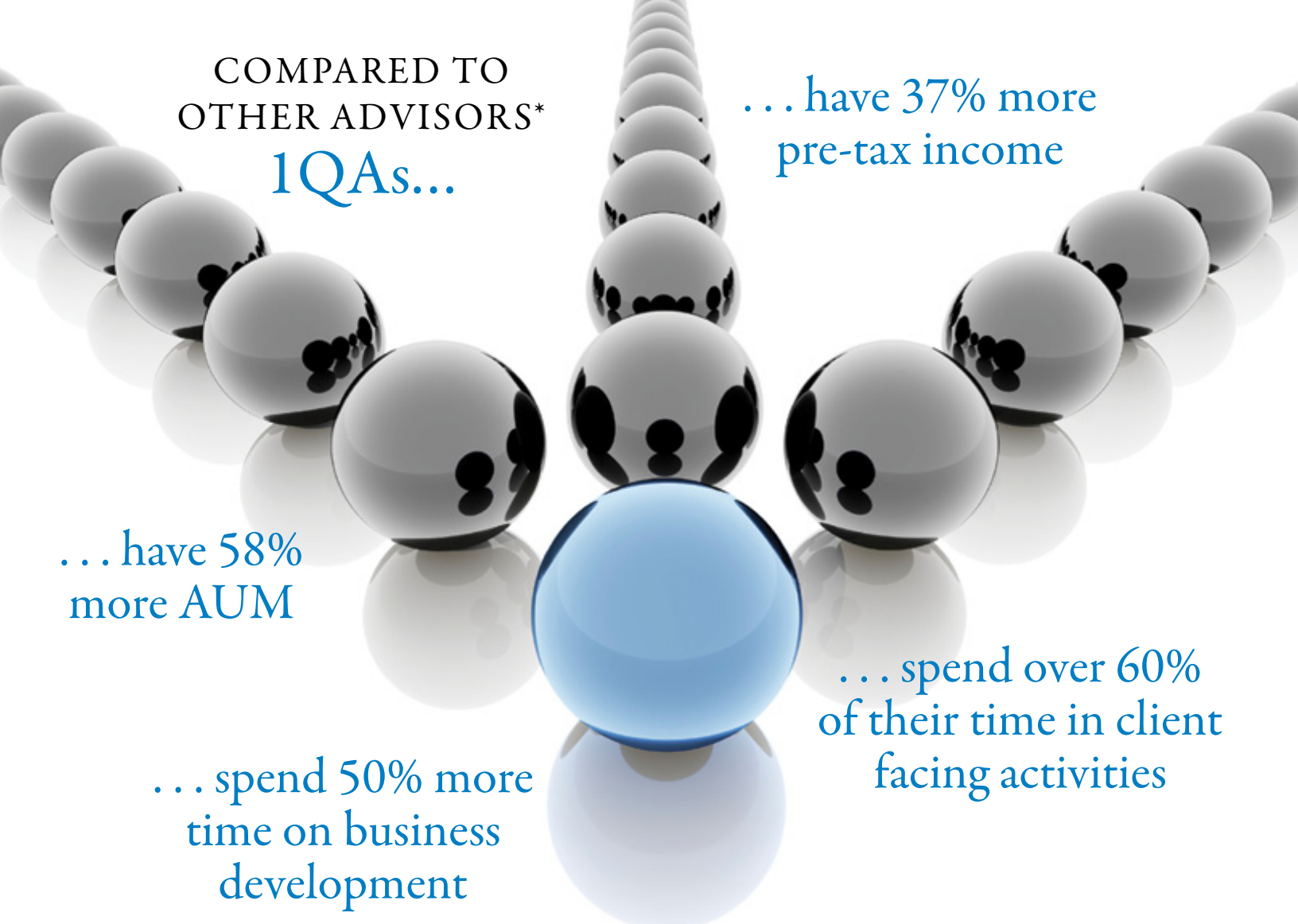
1QA Business Coaching is founded on the principles of *The Seven Essential Disciplines*, introduced in Genworth Financial Wealth Management's industry-recognized Mastery Program®. Through a series of retreats, peer group work, and one-on-one dialogue with a Business Coach, you will explore each of these strategic concepts that are critical to the success of your business. In addition to best practices and coaching support, you receive exclusive access to business tools, modules and libraries to develop customized best practices solutions and systems for implementation within your own business.

1QA Business Coaching offers a genuine partnership based on proven techniques from your most successful peers. Get ready for the next step. Welcome to 1QA Business Coaching.

## WHAT IS 1QA?

1QA stands for  
"Top-Quartile Advisor" –  
the top 25% of advisors,  
in owner income  
and profits.





COMPARED TO  
OTHER ADVISORS\*  
1QAs...

... have 37% more  
pre-tax income

... have 58%  
more AUM

... spend 50% more  
time on business  
development

... spend over 60%  
of their time in client  
facing activities

## ARE YOU READY FOR 1QA BUSINESS COACHING?

This program is not  
for everybody. It 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

If achieving success, increasing income, and more professional and personal satisfaction are what you're looking for...then you're ready for 1QA Business Coaching.

## WHAT IS INCLUDED

### DISCOVERY

A baseline assessment of your firm's strengths, challenges, and overall objectives

AT START

### COACHING RETREATS

Three retreats per year, 1 1/2 days in length, education on best practices strategies and solutions

3 PER YEAR

### GROUP COACHING CALL

Best practices strategy and implementation review (1 hour)

MONTHLY

### ONE-ON-ONE COACHING CALL

Individualized consulting support with Business Coach (1 hour)

MONTHLY

### ACCESS TO BUSINESS TOOLS

Access to interactive tools, modules and libraries

ONGOING

## 1QA BUSINESS COACHING CURRICULUM

#### Business Planning

1QA Efficient Frontier  
Vision, Values, & Goals  
Business Architecture  
Financial Management  
Financial Benchmarking  
Building & Realizing Value

#### 1QA Success Principle

Time Management  
Reality Checks  
Delegating to Support Staff  
Firm Communications  
Outsourcing Strategies

#### Business Development

Brand Development  
Elevator Pitch  
Niche Marketing  
Building Strategic Relationships  
Marketing Plan  
Prospect Process  
Mastering Referrals  
Client Satisfaction Survey

#### Staffing Strategy

Staff Development  
Hiring & On-boarding  
Training Programs

#### Team Building

Organizational Models  
Job Descriptions  
Career Ladders  
Compensation Plans  
Performance Reviews

#### Client Relationship Management

Client Base Analysis  
Client Segmentation  
Client Service Plan  
Ideal Client Profile

#### Fee Schedule & Analysis

New Client Process  
Annual Review Process

#### Operations Optimization

Building a Systems-based Business  
Systems Management Pyramid  
Firm Systems Model  
Work Flow Models  
Technology Solutions

(866) 469-3675

1QA@Genworth.com

Genworth Financial Wealth Management, Inc.

