



## Who is The Covenant Group?

We educate and coach independent financial advisors, providing them with the necessary business tools to improve their practice development capability.

## What outcomes can I expect?

Through the program you will learn to:

- Create a strategy to grow your business as you wish to define it
- Generate introductions, recommendations and referrals
- Make more sales to clients and prospective clients
- Build your business to create more free time and professional satisfaction

## What are the program options?

### Option 1: High-Performing Advisor 4 CD-ROM Suite NAIFA Members - \$125 (retail \$250)

Learn how to work “on”, as well as “in” your business through these interactive CDs by implementing 4 essential systems:

- Business Management System - Complete a Business Plan for your practice that acts as a roadmap for growing your business over the next three years. Move away from a reactive approach to doing business to a proactive one.
- Marketing System - Implement 6-8 robust marketing or promotional strategies to increase the profitability of existing client relationships and to attract new clients.
- Relationship Management System - Maximize the profitability of client relationships. Reduce the time you spend finding new clients and increase the value of each client relationship.
- Resource Management System - Make more money in less time by using the people, tools and services available to you.

### Option 2: Advanced Practice Development Portal NAIFA Members - \$400 (Retail \$500)

- Our state-of-the-art technology and intuitive Practice Development Portal (The Portal) is the operating system upon which you can grow your business. The Portal walks you through the planning process.

Some of the features The Portal provides are:

- 24/7 access to the status of your practice for you and your coach from anywhere in the world;
- Use of dynamic real-time audio and self-study modules;
- Detailed financial projections and tools to show the impact of potential new strategies on your bottom line; and
- Access to 20 years of case studies, documents, rich media and tools focusing on improving your practice.

### Option 3: Online Self Study NAIFA Members - \$900 (retail \$1000)

- Five live, web-based workshops where you cover each of the five phases of the Business Builder model – Mindset, Target, Engage, Commit and Expand. Each step is designed to maximize the opportunities you can create with new and prospective clients. You will receive case studies, exercises, and priceless insights from seasoned financial services professionals.
- Two Group Coaching sessions (via Webinar/teleconference) at 45- and 90-days.
- Six months access to our online learning Portal detailed above. You will have access to pre-recorded, content-rich webinars: The first details your Business Definition (Vision, Mission, Values, and Business Opportunity); the second is about building your revenue & expense forecasts and generating your one- and five-year income statements.

## One more thing... What does it take to get enrolled?

Contact Shauna at The Covenant Group directly at 877.903.3878 ext. 314 or [shauna@covenantgroup.com](mailto:shauna@covenantgroup.com). It's that easy!