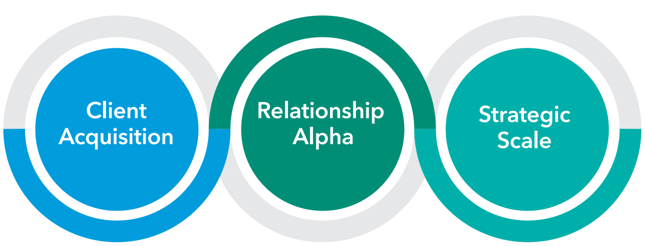
Practice Management

Capital Group Practice Management: Built for your success

We start by understanding your most important goals.

Our team of practice management specialists brings you actionable programs that align to the key factors that drive advisors' success. Those factors – client acquisition, relationship alpha and strategic scale – are drawn from **Pathways to Growth: Capital Group's Advisor Benchmark Study.**



"The curriculum was engaging and interactive and allowed our advisors to personalize strategies to their business."

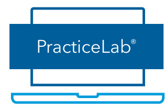
– Wirehouse sales manager

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

"I used to run my business, but now the business is running me. How can you help?"

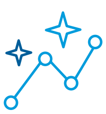
Getting started with Capital Group practice management

Our team of practice management specialists understands your challenges and goals, and we connect you to the curriculum that's right for your needs.



PracticeLab®

Our digital destination for practice management offers articles, webinars and podcasts, with actionable ideas to help advisors grow their businesses and engage their clients.



Pathways to Growth

Capital Group's proprietary, multiyear benchmark study of over 2,300 advisors that identified key drivers of business growth.

Elite Engagement™

For select advisors, Capital Group offers group workshops, as well as individual consulting and a customized learning curriculum.

"Through our work with thousands of top advisors, we have seen that the most successful ones artfully combine client management, business management and investment management. Helping you develop a deliberate and strategic approach for your practice is what makes our program stand out."

– Paul Cieslik, Advisor Practice Management Consultant at Capital Group

Ways you can engage

We offer a range of opportunities for advisors to engage with practice management resources based on their goals, needs and preferred learning styles.

Assess

Your Growth Plan: Advisor Benchmark Service

A personalized growth and development plan

Explore and learn

PracticeLab®

Self-guided digital learning

Elite Engagement™

Personalized, hands-on consulting and workshops

Implement

Accountability

Detailed worksheets and 21-day action plans as well as ongoing Capital Group support

Elite Engagement

With Elite Engagement, we partner with you to help your advisors get attention and support designed around their specific growth goals and opportunities.

Learn more about our team and workshops on the back cover.

- **Guidance from experienced consultants**
- **Customized curriculum designed around your goals**
- **Highly structured learning experiences delivered in person or virtually**
- **Implementation and accountability partnership**

Experienced guidance

Our team of practice management specialists understands why advisors succeed, and we connect them to the learning resources designed around important challenges and goals.

Practice Management

- Turbocharge your brand
- Acquire the ideal client
- Deliver results, not performance
- Deliver priceless value
- Drive productivity and efficiency
- Fuel growth with a COI engagement strategy
- Prospect and grow using digital strategies
- Acquiring modern retirees
- Future-proof your practice
- A leader's guide to succession planning

Paul Cieslik,
Advisor Practice Management Consultant

Wassan M. Kasey,
Advisor Practice Management Consultant

Max McQuiston, CIMA®, CFP™, RMA®,
Advisor Practice Management Consultant

Leah Ryan, CRPC®,
Advisor Practice Management Consultant

Retirement

- Building retirement income resilience
- Differentiating your brand in the new now
- Retirement in motion: Delivering income strategies both in and out of retirement plans

Kate Beattie, CFP™, RICP®,
Senior Retirement Income Strategist

Jonathan Young, PPC®,
Senior National Account Manager

Wealth Strategy

- Tax and estate planning
- Life milestones and transitions
- Philanthropy and gifting
- Business and career transitions

Leslie Geller, LLM, J.D.,
Senior Wealth Strategist

Ready to take the next step?

Ask your Capital Group representative how we can customize a practice management program for your advisors.

Capital Client Group, Inc.

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