Mentorship Training Agenda

Studium, derived from Latin for study, resonates deeply with qualities essential for success as an independent financial service representative—zeal, eagerness, pain, interest, and devotion. In an industry fraught with challenges, our mission at C4G is clear: ***to empower advisors personally and professionally through comprehensive support and a robust industry network.***

Monthly Sessions
3rd Thursday (1.5 hrs)

Bonus Sessions
4th Thursday as Listed (1 hr)

January – Process

1. Referral
2. Sales
3. Client Segment
4. Client Service
5. Onboarding / Offboarding

January Bonus Session – Prospecting

1. Referrals
2. Wallet Share
3. Niche Opportunities
4. Community Events
5. Seminars
6. Lead Services

February – Client Experience

1. Service Experience
2. Portfolio
3. Process Positioning
4. Absolute Performance

March – End In Mind

1. Business Valuation
2. Product Mix
3. Marketing Mix
4. AUA and AUA
5. Client Acquisition Costs
6. Profit Over Volume

April – Client Events

1. Purpose
2. Structure
3. Commitment
4. Client Event Ideas

April Bonus Session – Prospecting

(same as January sessions)

May – Business Operations

1. Efficiency
2. Process
3. Staff
4. Mission / Organizational Emphasis / Efforts
5. Communication

June — Importance of Strategic Partnerships

1. Alignment
2. Broker-Dealer
3. IMO
4. RIA
5. Strategic Alliances for Prospects / Clients
6. Third-Party Money Managers

July — Absolute Performance is the Goal

1. Return is Got the Experience
2. Focus on the Island, Not the Waves
3. The Process is the Plan
4. Relationship Building / Trust

August — Client Education

1. Seminars: Social / Educational
2. Mailers
3. Email Campaigns
4. Weekly Market Commentary

August Bonus Session — Prospecting

(same as January & April sessions)

September – Degree of Separation

1. Value Proposition
2. Community Presence
3. Collateral Material
4. Articulating Your Value
5. Media / Advertising

October – Practice Hacks

1. Manage without Separation of Service
2. Beneficiary Accounts
3. White Label
4. Automation
5. Control the Message with Pre-Planning

November – Personal Journey

1. Family
2. Firm / Professional
3. Education
4. Philosophy

December –Year End Planning

1. Goals vs Obligations
2. Personal
3. Professional
4. Production
5. Surround Yourself with Success
6. Activity is Not the Achievement

Contact us with any questions or for more information.

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