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Business Management Peer Group Topics

- Technology (onboarding, CRM, rebalancing, software tools)
- Client Acquisition / Retaining Clients
- Acquiring / Retaining Teammates (HR good hiring standards)
- Remote working arrangements
- Employee Compensation
- Working with the Next Generation – G1 vs G2
- Business Succession Planning
- Hiring / Firing
- Growing the business – buy advisor assets/firm/organically
- Business Development – Prospect Stream Strategy
- Wallet Share
- Marketing (newsletters, client outreach, events, podcasts, social media)
- Internal Training and Career Progression
- General productivity/efficiency
    - What to do with smaller, non-profitable clients – or servicing small clients
- Retirement / Income streams
- Thought Growth (books, Peer Groups, Podcasts, etc.)
- Benchmarking for clients – Absolute Performance vs Index
- Cyber Security
- DOL
- Business Dashboard - EOS
- Sales Organization vs Business
- Client Segmentation and service standards
- How to get younger employees / compensate to bring in new clients – G1 vs G2 Mindset
- Aging client base – engaging the next generation of client
- Working in the Retirement plan space – Activity or Achievement
- Center of Influences and Strategic Alliances
- Measuring Client Satisfaction
- Asking for Referrals with a Referral Campaign and Process
- Compliance
- Fees and your value proposition
- The Attraction of alternatives
- Portfolio model efficiency
- Robo-Advisors - a threat to your value proposition?

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Investment Management Peer Group Topics

- Investment Committee Structure
- Trading best practices
- Alternatives / Non-Traditional
- Short Term Cash Solutions
- Income Products
- Direct Indexing -Why and when – Client segmentation
- Index vs Active – Client segmentation
- ETFs vs Mutual Funds vs Individual Securities – Perception and client expectations
- Technology (re-balancing software, trading software)
- ETF Models – Institutional vs Static
- Benchmarks – Setting Expectations
- Fixed Income Positioning
- Municipals
- International Equity splits – 70/30, 60/40
- Outsourcing with SMAs or in-house custom
- Integrating investments after M&A
- ESG – Marketing advantage or headache
- DAF – Donor Advised Funds
- Outsourced CIOs – Overhead vs Value Proposition

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Financial Planning Peer Group Topics

- Maximizing use of Technology (Money Guide Pro, EMoney, Black Diamond, Navi Plan, Orion, Crescendo, Income Solver, Tamarac, Albridge)
- Roth conversions
- Absolute Performance vs Market returns
- Process is priceless
- Estate Planning
- Tax Planning
- Business Planning
- Charitable Giving – Community Engagement
- Engaging the next generation for planning (Intergenerational Wealth Transfer)
- Medicare
- Helping older clients
- Social Security - Education

For more information, please contact:

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