PRACTICE
MANAGEMENT CONSULTANTS, LLC

TRAINING FOR DIVERSE FINANCIAL ADVISORS:

Practice Management | Sales Communication | Leadership Skills Training

PracticeManagementConsultantsLLC.com

Who is Practice Management Consultants?

Practice Management Consultants, LLC (PMC-LLC) was founded to fulfill the need for culturally diverse and experienced advisor coaches in the wealth management industry.

At PMC-LLC, we coach ethnically diverse financial advisors. With an average of 20 years of industry experience in our field of expertise, our coaches bring a unique advantage to the wealth management coaching industry.

We believe that supplemental coaching programs specifically designed with diverse financial advisors in mind add value – to the advisor, the client, and the brand the advisor ultimately represents.

Coaching sessions are a great way to empower and encourage an advisor to take responsibility for their goals with actionable items. We provide coaching in both one-on-one and group settings, helping advisors focus on individual needs and identify opportunities for further growth.

PMC-LLC Training & Coaching Services

PMC-LLC offers Supplemental Professional Development Coaching and Training (SPDC&T) through our **KOYA℠ System**.

As part of our mission, we focus training on these two areas to leverage the four quadrants of wealth:

1. **Comprehensive wealth planning**
2. **Generational wealth transfer strategies**

These focus areas align with our mission of bridging the generational wealth gap between black and white Americans in one generation. We are a solution that leverages ethnically diverse financial advisors and planners to engage culturally diverse households.

KOYA℠ System

One of the languages that Christian Nwasike, founder of PMC-LLC, speaks is Hausa—'Koya' means 'to teach or learn.'

"Your coaching has been very helpful to me in navigating the industry as a newer financial advisor. Thank you for the extra confidence your coaching provided me."

—Marcus, *Financial Advisor, DC*

With access to subject matter experts in a variety of skills, our clients can expect to expand their knowledge base and grow as advisors.

PMC-LLC stays up-to-date in the wealth management industry and leverages technology and resources to deliver dynamic content for each of the advisors we work with.

PMC-LLC Coaching & Training Includes:

COMPREHENSIVE PRACTICE MANAGEMENT

Your PMC-LLC coach will share strategies for running a successful practice from the ground up. We take Advisors on an exploratory tour of the different phases of starting a business, including developing a business plan, writing a target market prospect strategy, and developing team members.

COMMUNICATION ENRICHMENT

Your PMC-LLC coach will share communication strategies for client meetings that will resonate with your clients, as well as explore the many communication tools available to industry professionals. Coaches also focus on the importance of using communication as a tool to enhance your business and deepen client relationships.

PROSPECTING AND SALES TRAINING

Your PMC-LLC coach will teach the importance of strategic prospecting and closing techniques for diverse Financial Advisors through our Prospecting and Sales Training. This course focuses on how to build a strong brand and how to place it in the marketplace for maximum effectiveness.

LEADERSHIP SKILLS ENHANCEMENT

Your PMC-LLC coach will share leadership styles, how to develop your own effective style, and the importance of culture in the workplace. We also assist advisors with navigating corporate culture, including having difficult conversations with clients and team members.

"The program lit a fire under me and it gave me the motivation to manage my book and processes better."

—Bob, *Financial Advisor, VA*

Pillars of PMC-LLC Coaching

PERFORMANCE
Coaches will enhance your talent and abilities. We train you to focus your skills and direct your attention to the goals at hand, cheering you on to higher levels of performance.

ACCOUNTABILITY
A PMC-LLC coach keeps you accountable and on task. Consider this: On your own, and without experienced guidance, you could spend hours at a gym exercising but only see minimal improvements. Hiring a personal fitness trainer will focus your workouts for better results. In the same way, investing your time with experienced, culturally diverse PMC-LLC coaches can help you achieve your business goals more efficiently and effectively.

STRATEGY
A PMC-LLC coach helps you navigate everyday practice management obstacles that you may come across while running your business. We help construct strategic operational plans built off your vision and designed specifically with your clients in mind.

EXPERIENCE
A PMC-LLC coach provides a fresh perspective. We utilize up-to-date industry trends, personal experience, and proven principles to produce positive results and propel you to success. With decades of experience in their respective fields of expertise, PMC-LLC coaches provide depth, clarity, and cultural enhancement to further validate your differentiating factors within the wealth management industry.

The PMC-LLC Process

First, we take the time to understand your needs. This means learning what training is currently in place at your company, what challenges you may be facing, and what your current goals are.

Once we have a good understanding of where you are at, we create a customized curriculum that fits your needs. We present your curriculum for review and, once approved, we're ready to get started.

Most curriculums include 4-6 months of coaching. At the end of your coaching duration, any necessary reports, action items, and feedback will be shared.

ONE-ON-ONE COACHING
Effective one-on-one coaching can produce accelerated results. Coaching can also greatly enhance a financial advisor's productivity around the core activities of their firm reducing their overall workload.

One-on-one coaching sessions have become a significant part of many advisors' internal processes. Managers are also realizing the power of these employee-focused sessions – coaching advisors drives higher performance.

GROUP SESSIONS
When one-on-one coaching is not an option, we also offer group sessions. These master classes focus on a specific curriculum based on the needs of the company.

RESULTS-DRIVEN
In a survey of over 20 wealth management companies, the main benefits of coaching reported were improved individual performance, bottom-line results, skills and self-empowerment, goal achievement, and retention.

96% of companies reported coaching improved **individual performance**

92% reported improvements in **sales, leadership, and communication**

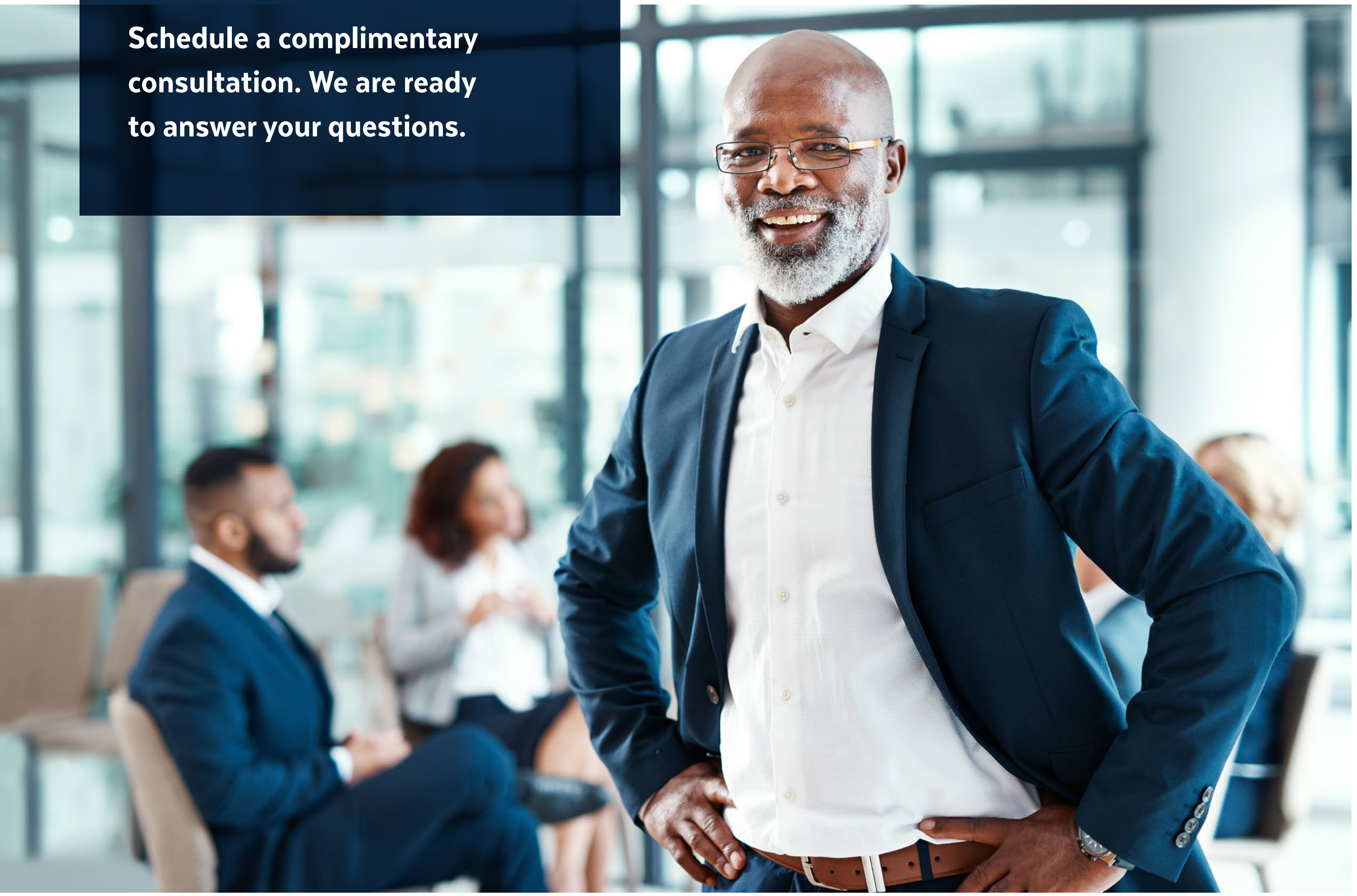
WE WANT TO HEAR FROM YOU!

Do you have a question about our coaching techniques or pricing models? Want a demo of our coaching?

Schedule a complimentary consultation. We are ready to answer your questions.

"Your coaching program is very effective. It helped me grow my business by double digit percentages and got me recognized as a top producer. Thank you."

—David, *Financial Advisor, NY*



The Value of PMC-LLC Coaching & Training

Our SPDC&T builds up ethnically diverse advisors' competencies around the areas of practice management, communication, sales, and leadership.

PROGRAM PARTICIPANTS HAVE ACCESS TO:

1. **A custom-tailored curriculum** designed to help identify and take advantage of your strengths and opportunities.
2. **Relevant strategic information** that can help build client relationships and increase your revenue.
3. **A team of Subject Matter Experts** with experience and success in the wealth management industry.
4. **120 years of combined industry experienc**e with an ethnically diverse perspective

Advisors who have participated in our sessions have seen:

25% OR MORE increase in year-over-year annual revenue growth

INCREASED CONFIDENCE to engage with prospects and clients

WHO BENEFITS FROM COACHING?

While anyone can benefit from coaching sessions, our programs are great for financial advisors who are:

- **Struggling** to grow their revenue and client base, either as a solo-producer or as part of a team
- **Committed** to reaching their goals at a faster pace
- **Ready** to be in control of their practice, rather than feeling like their practice controls them

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