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Strategies and insights to help advisors grow their skill sets, teams and practices

Insights to Support Practice Management

The After-Tax Advisor®

Help clients think ahead to improve their tax experience

Chasing Positivity®

Apply the **3 Dynamics** to your conversations to create motivating environments and inspire action



Attracting Clients

Activate a growth mindset to expand your business

Bridge to Referrals

Build a bridge to referrals with more purposeful messaging

Working With the Wealthy

Differentiate your capabilities in conversations with high-net-worth clients

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Commentary to help you elevate the success of your practice

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