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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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