



# Building a better practice: Adapt and accelerate

## Why participate in this program?

- Clients' expectations continue to evolve, putting more strain on margins and profitability
- Identifying your differentiators and drivers of client satisfaction empowers you to optimize how you spend your time
- Accelerate the growth of your practice by creating efficiencies and focusing on high-value activities that generate revenue and referrals

*Practice management professionals report that the most prevalent productivity challenge for advisors is serving non-ideal clients<sup>1</sup>*

### LEARNING OUTCOMES

Effectively communicate your value to clients

Avoid five top productivity killers

Align your service model and client experience

### QUESTIONS ADDRESSED

How can I add more value to my client relationships?

How can I serve all my clients more efficiently?

How can I leverage technology to provide a better client experience?

### FORMAT

50-minute presentation, available live and on demand

One hour available CE credit for CFP and IWI, CPE credit for CPAs

Supplemental 25-minute presentation on leveraging digital technology

## Summary

Financial professionals can accelerate the growth of their practice by delivering what clients value most. This program is designed to help advisors take simple steps to align the services they offer with clients' needs and priorities.

I gained new perspective – I'd call it a growth mindset.

I pinpointed the intersection between what I do and what my clients really want and value.

We identified activities and clients that don't merit the time we were spending on them.

## Additional resources



**BUILDING A BETTER PRACTICE WORKBOOK** leads you through creating a compelling value proposition for your target audiences, and identifying a range of opportunities to implement efficiencies and accelerate business growth



**DIGITALLY ENGAGED PROFESSIONAL GUIDE** dives deeper into digital technology tools that can support brand-building and operational efficiencies



**ACTIONABLE ARTICLES** focus on upgrading your digital strategy, building a diverse team and more

## ADVISOR EDUCATION SPECIALISTS



**James Bergeron, J.D.**



**Molly Huck, CIMA®**



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**Christine Stokes**

Contact your Nuveen Advisor Consultant today at **800.221.9271** for more information.

### About Nuveen Advisor Education

Nuveen brings our financial professional partners — and their valued clients — an award-winning group of subject matter experts ready to share ideas, insights and educational programs. Whether it's a focus on enhancing an advisor's practice, acquiring new clients or current, actionable market and asset class insights, Nuveen offers timely and relevant content and programs.

*We look forward to partnering with you.*



1 Source: Cerulli 2022, <https://www.napa-net.org/news-info/daily-news/cerulli-non-ideal-clients-undermine-productivity>

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