A Powerful Formula to Increase Success
People + Process = Performance™

For any business to perform at its highest level and achieve maximum profitability there must be an ongoing commitment to invest in **developing both its people and efficient processes**. Know No Bounds and Paragon Resources structure their solutions with the guiding principle of **People + Process = Performance™**. As financial professionals, your focus is often ROI; ours is ROP - Return on PEOPLE and PROCESS.

First and foremost, whether a corporate leader or individual advisor, one must understand the gaps and responsibilities required in order to find the right **PEOPLE** to fill those specific roles. Teams are comprised of INDIVIDUALS who are all driven and motivated by different elements and are gifted with varying talents. Ensuring that the right people are engaged in the right roles and have the right developmental opportunities and environments is essential in *maximizing talent and retaining your most important resource.*

PROCESS is the second key ingredient to success. In today's more complex world, with increased rules, regulations, and administrative requirements, time has become a most precious commodity. Systematizing one's business is essential. Individual advisory teams and firms need to have simple and executable processes in place in order to *maximize their time and resources.*

Performance Insights Process™

A powerful and unique suite of diagnostic tools, our Performance Insights Process™:

- identifies the potential performance barriers that are hindering the ultimate success of an advisory team
- facilitates key decisions that need to be made for the future growth of the practice
- provides a roadmap for specific action

Professional advisors know how important it is to conduct a thorough assessment of a client's situation before making recommendations. They also know the benefits of asking the right questions. In many cases, the assessment itself can be "worth the price of admission" since it helps clients realize where the gaps are in their current financial plan. For this same reason, we utilize assessments when building and developing a high-performance practice.

The assessments utilized through our Performance Insights Process™ cover three critical elements.

Individuals: People are fundamental to maximizing overall performance. This area of the process utilizes the *Strengths and Motivators Assessments* to help ensure that the right people are engaged in the right roles and are highly effective in their interactions with one another and their clients.

Team: In order to properly serve clients, teams are now essential. One key benefit of a team is to orchestrate everyone's talents towards a common goal. The *Team Performance Assessment* allows each member to provide their perspective on understanding their current team dynamics and areas where they can increase their effectiveness.

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<u>Business</u>: You must KNOW your business intimately if you want to GROW your business. Analyzing all aspects of a practice leads to optimizing its performance and increases long-term viability. Our final diagnostic, *Business Performance Assessment*, solicits each team member's perception of both the efficiency and effectiveness of all core functions of the business.

All of the assessments utilized in the Performance Insights Process™ are administered online and have a foundation of proven practice management expertise for the financial services industry. The following is an overview of the process.

Knowledge ➔ Awareness ➔ Action ➔ Results

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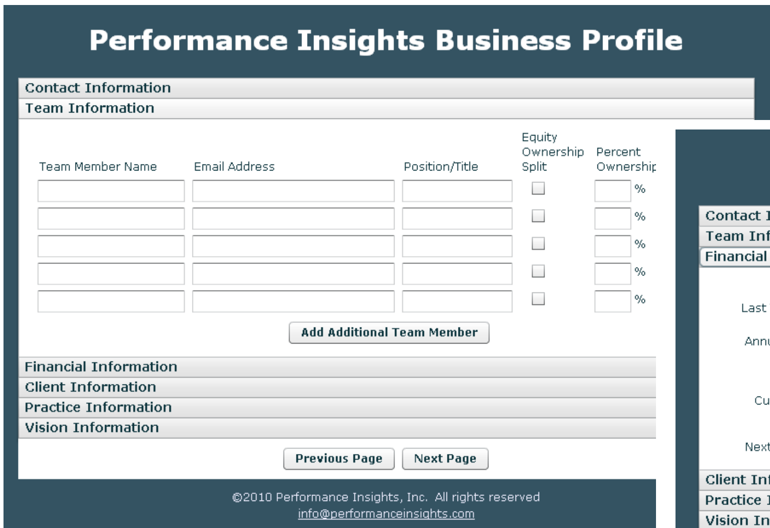
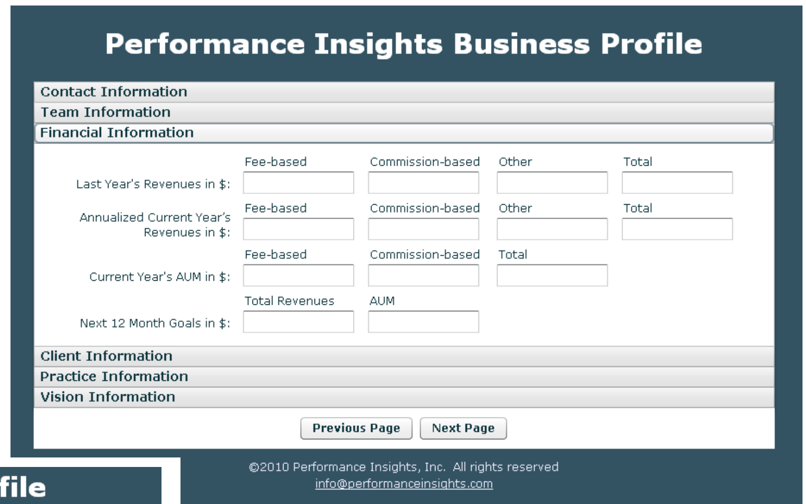
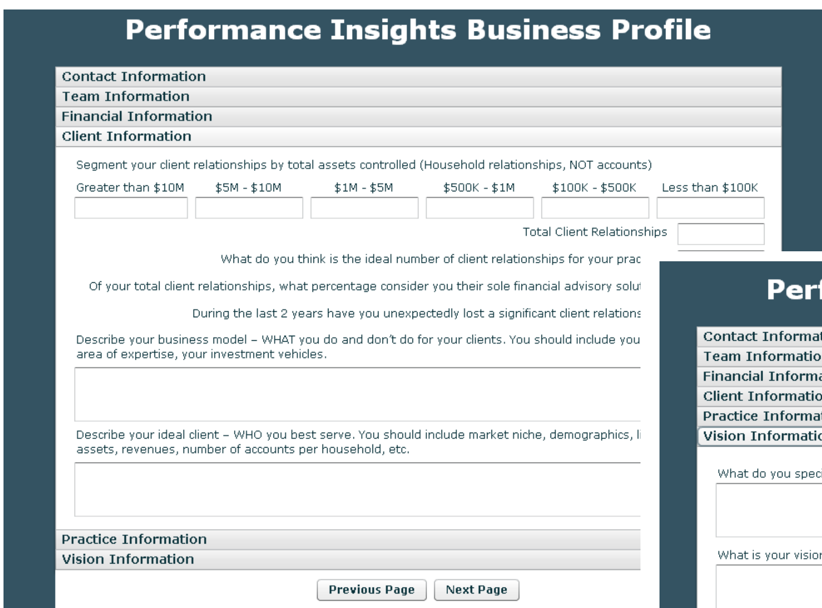
Step 1: Business Profile – Snapshot of Advisory Team Practice
Principal(s) provide data on the following:

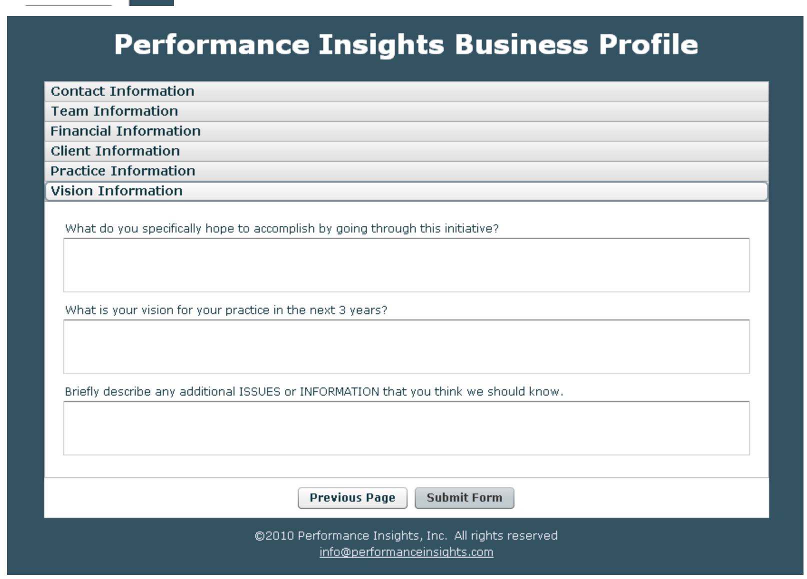
- Contact Information
- Team Information
- Financial Information
- Client Information
- Practice Information
- Vision Information

Time Commitment: 20-30 minutes









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Step 2: Team Member Data Collection

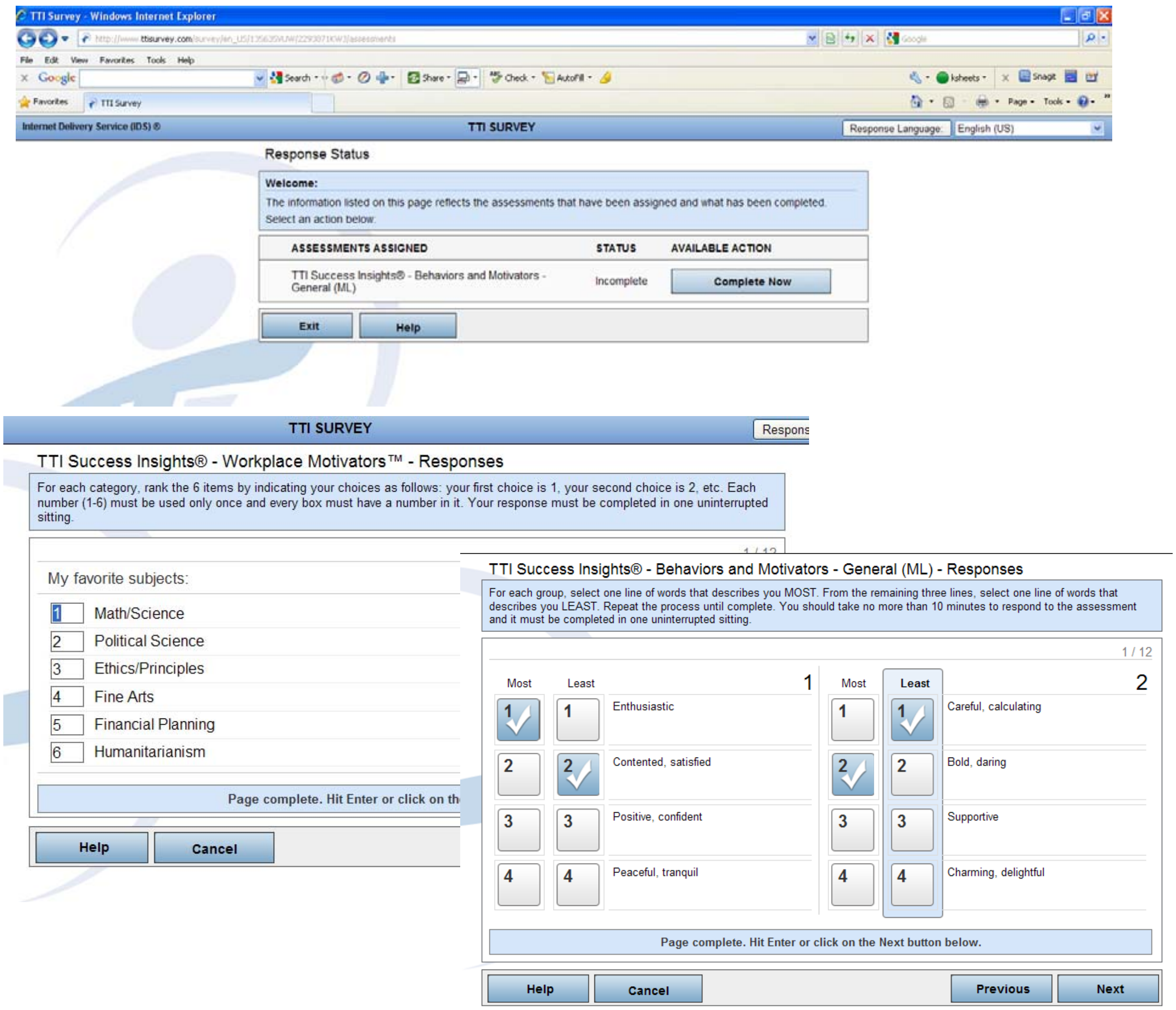
Each team member is emailed instructions for completing three online assessments:

- **Individual Strengths and Motivators**
- **Team Performance**
- **Business Performance**

Time Commitment: 40-60 minutes

Individual Strengths and Motivators Assessment

36 Questions



DISC Explains HOW a person behaves, what their natural strengths are, the type of work each team member should do and their preferred work environment. It is an excellent tool for identifying roles and responsibilities and the communication style of each team member. Workplace Motivators explains WHY a person does what they do, what drives them, and how they can be motivated. This is an excellent tool for identifying the culture and chemistry of a team so that team members enjoy working with one another.

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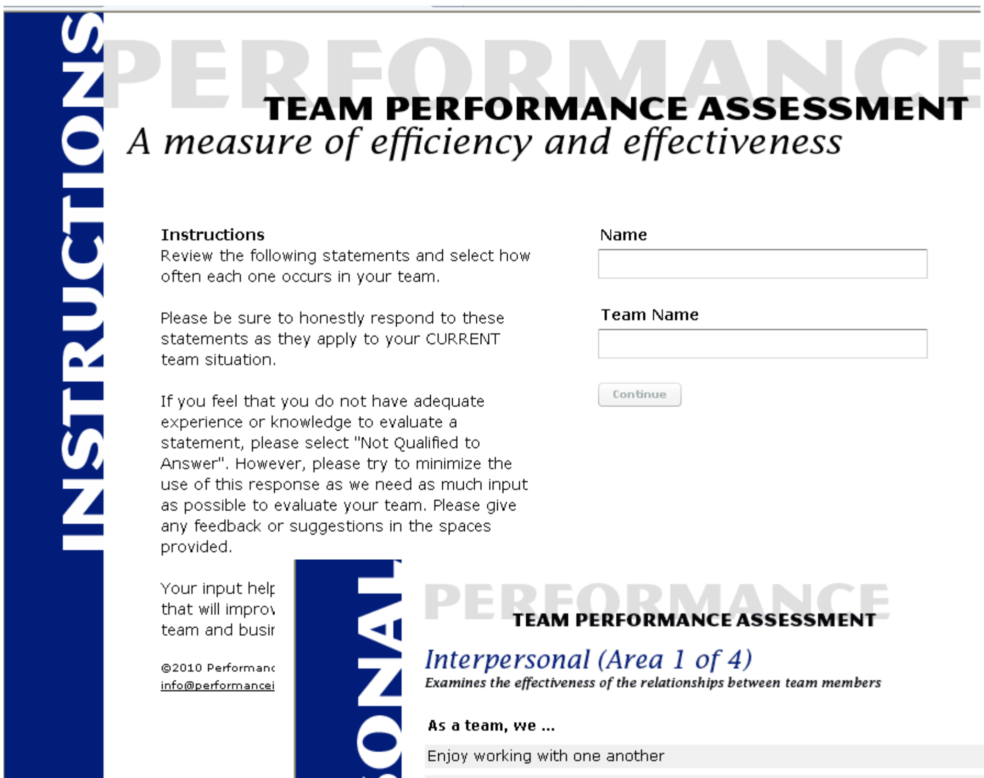
Team Performance Assessment

Each member will rate the overall team dynamics based on four areas:

- **Interpersonal**: Examines the effectiveness of relationships among teams members
- **Structure**: Examines the effectiveness of how the team operates
- **Management Approach**: Examines the effectiveness of how strategies and tasks are determined, managed and executed
- **Leadership**: Examines the effectiveness of how the team is led

48 Questions


INSTRUCTIONS

PERFORMANCE

TEAM PERFORMANCE ASSESSMENT

A measure of efficiency and effectiveness

Instructions

Review the following statements and select how often each one occurs in your team.

Please be sure to honestly respond to these statements as they apply to your CURRENT team situation.

If you feel that you do not have adequate experience or knowledge to evaluate a statement, please select "Not Qualified to Answer". However, please try to minimize the use of this response as we need as much input as possible to evaluate your team. Please give any feedback or suggestions in the spaces provided.

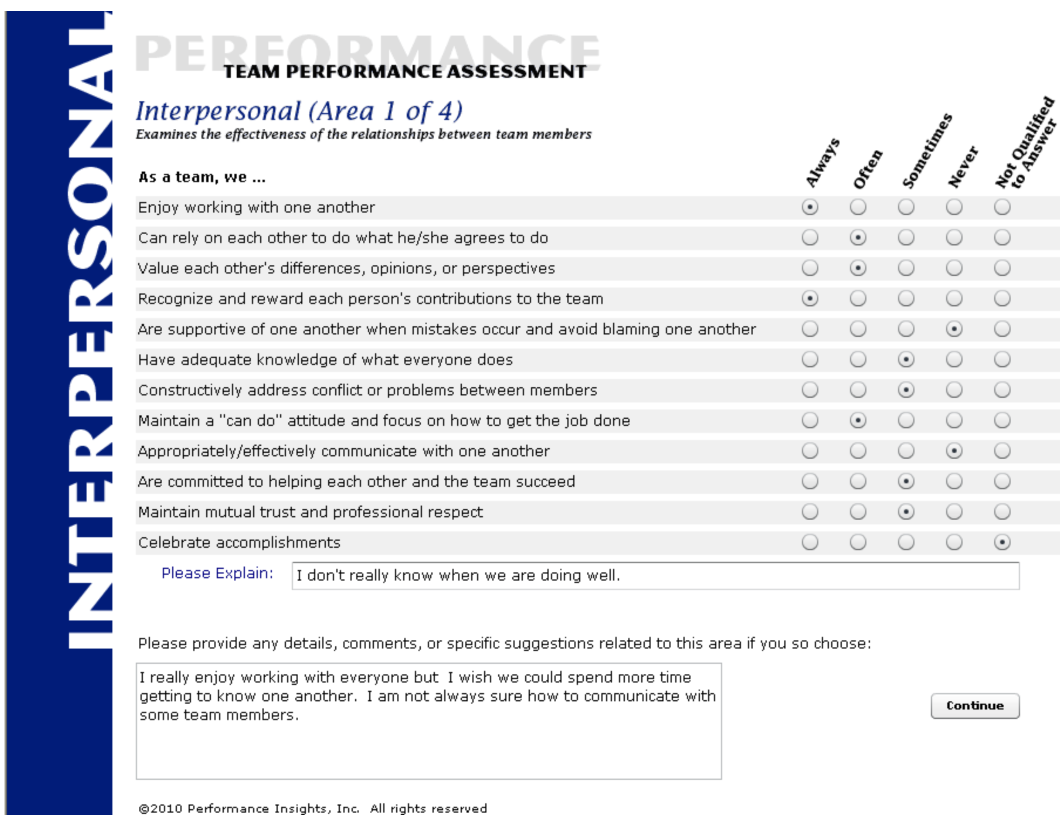
Your input help that will improv team and busir

©2010 Performanc info@performancei

Name

Team Name

Continue


INTERPERSONAL

PERFORMANCE

TEAM PERFORMANCE ASSESSMENT

Interpersonal (Area 1 of 4)

Examines the effectiveness of the relationships between team members

As a team, we ...	Always	Often	Sometimes	Never	Not Qualified to Answer
Enjoy working with one another	●	○	○	○	○
Can rely on each other to do what he/she agrees to do	○	●	○	○	○
Value each other's differences, opinions, or perspectives	○	●	○	○	○
Recognize and reward each person's contributions to the team	●	○	○	○	○
Are supportive of one another when mistakes occur and avoid blaming one another	○	○	○	●	○
Have adequate knowledge of what everyone does	○	○	●	○	○
Constructively address conflict or problems between members	○	○	●	○	○
Maintain a "can do" attitude and focus on how to get the job done	○	●	○	○	○
Appropriately/effectively communicate with one another	○	○	○	●	○
Are committed to helping each other and the team succeed	○	○	●	○	○
Maintain mutual trust and professional respect	○	○	●	○	○
Celebrate accomplishments	○	○	○	○	●

Please Explain: I don't really know when we are doing well.

Please provide any details, comments, or specific suggestions related to this area if you so choose:

I really enjoy working with everyone but I wish we could spend more time getting to know one another. I am not always sure how to communicate with some team members.

Continue

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Team members can provide comments or suggestions when appropriate.

Business Performance Assessment

Each member rates the efficiency and effectiveness of seven areas of your business:

FIND

- Marketing
- Sales

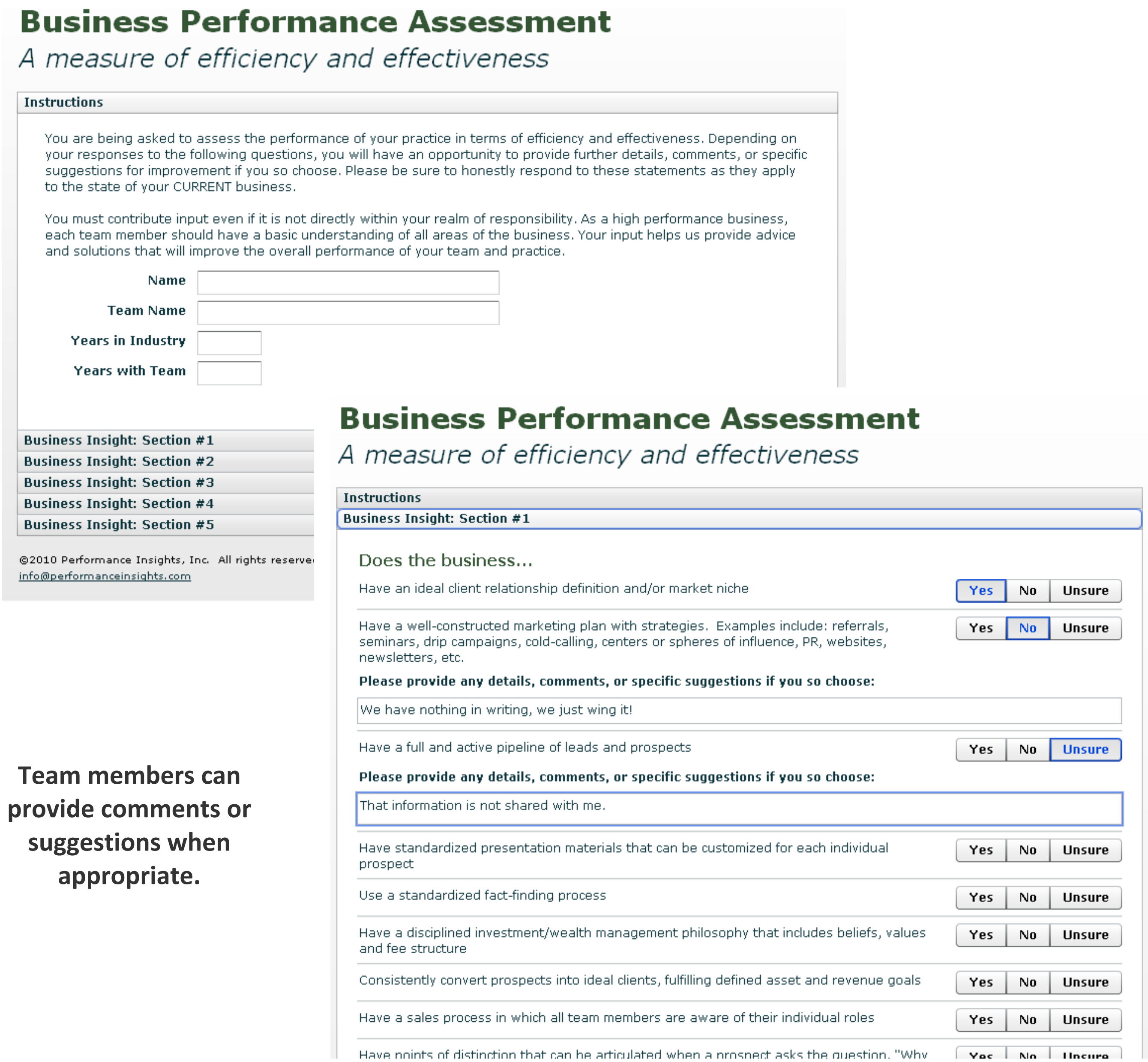
GRIND

- Investment/Wealth Management
- Administration & Operations
- Ongoing Performance Analysis & Reporting

MIND

- Client Management
- Practice Management

72 Questions



Business Performance Assessment

A measure of efficiency and effectiveness

Instructions

You are being asked to assess the performance of your practice in terms of efficiency and effectiveness. Depending on your responses to the following questions, you will have an opportunity to provide further details, comments, or specific suggestions for improvement if you so choose. Please be sure to honestly respond to these statements as they apply to the state of your CURRENT business.

You must contribute input even if it is not directly within your realm of responsibility. As a high performance business, each team member should have a basic understanding of all areas of the business. Your input helps us provide advice and solutions that will improve the overall performance of your team and practice.

Name

Team Name

Years in Industry

Years with Team

Business Insight: Section #1

Business Insight: Section #2

Business Insight: Section #3

Business Insight: Section #4

Business Insight: Section #5

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info@performanceinsights.com

Business Performance Assessment

A measure of efficiency and effectiveness

Instructions

Business Insight: Section #1

Does the business...

Have an ideal client relationship definition and/or market niche — Yes | No | Unsure

Have a well-constructed marketing plan with strategies. Examples include: referrals, seminars, drip campaigns, cold-calling, centers or spheres of influence, PR, websites, newsletters, etc. — Yes | No | Unsure

Please provide any details, comments, or specific suggestions if you so choose:

We have nothing in writing, we just wing it!

Have a full and active pipeline of leads and prospects — Yes | No | Unsure

Please provide any details, comments, or specific suggestions if you so choose:

That information is not shared with me.

Have standardized presentation materials that can be customized for each individual prospect — Yes | No | Unsure

Use a standardized fact-finding process — Yes | No | Unsure

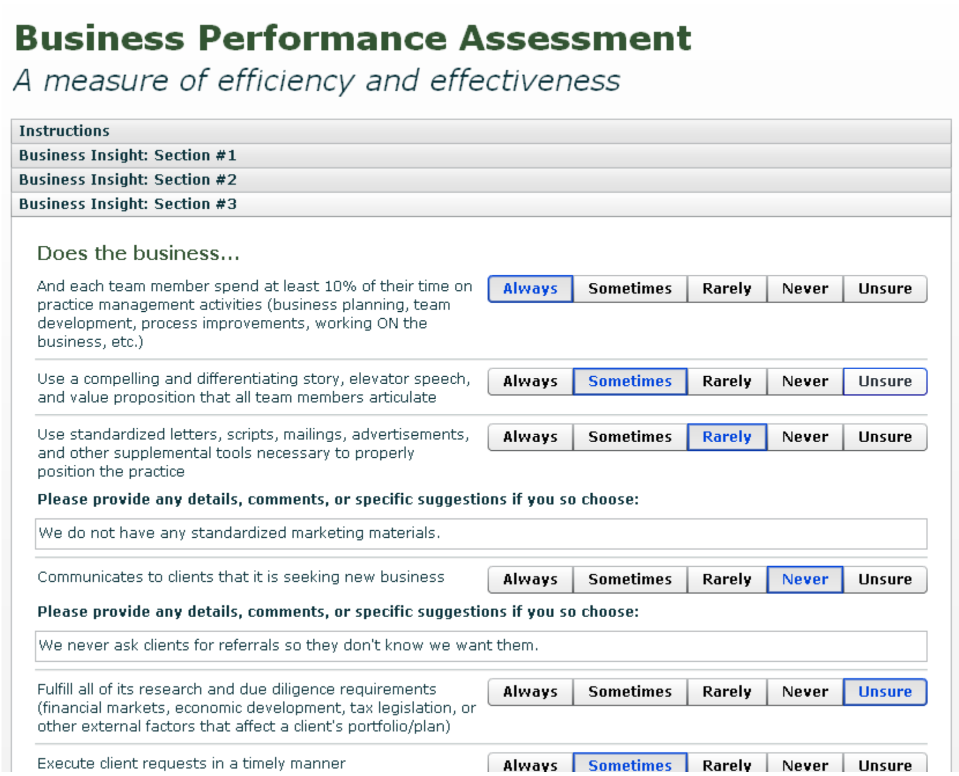
Have a disciplined investment/wealth management philosophy that includes beliefs, values and fee structure — Yes | No | Unsure

Consistently convert prospects into ideal clients, fulfilling defined asset and revenue goals — Yes | No | Unsure

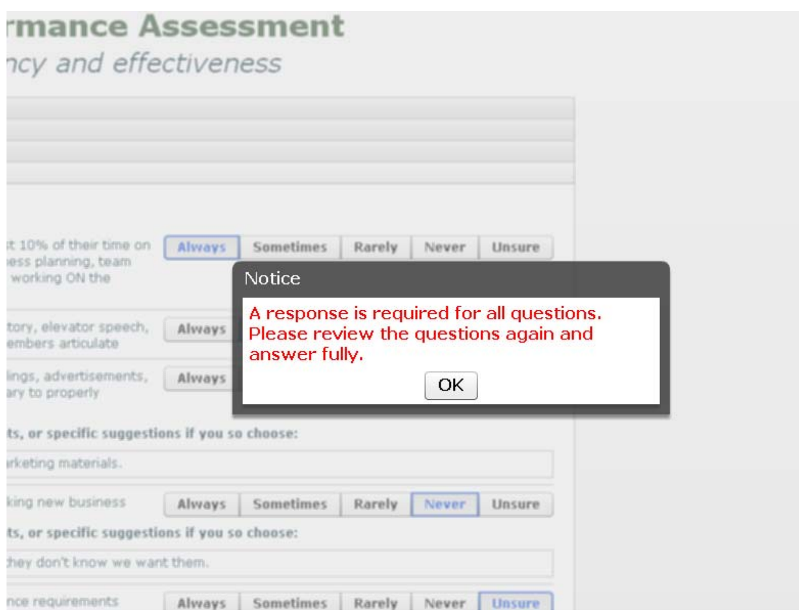
Have a sales process in which all team members are aware of their individual roles — Yes | No | Unsure

Have points of distinction that can be articulated when a prospect asks the question, "Why — Yes | No | Unsure

Team members can provide comments or suggestions when appropriate.



We believe all team members should be able to respond to all questions on this survey.



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My team dedicates the necessary time, resources, and effort to achieve the objectives for:

(choose all that apply)

- Marketing
- Sales
- Investment/Wealth Management
- Administration & Operations
- Performance Analysis & Reporting
- Client Managment
- Practice Management

In which area(s) do you believe the business runs efficiently and effectively? (Efficiently is doing things the right way, effectively means doing the right things)

(choose all that apply)

- Marketing
- Sales
- Investment/Wealth Management
- Administration & Operations
- Performance Analysis & Reporting
- Client Managment
- Practice Management

Previous Section | Next Section

Business Insight: Section #5

The team is asked to rate each functional area of the business.

Business Insight: Section #1
Business Insight: Section #2
Business Insight: Section #3
Business Insight: Section #4
Business Insight: Section #5

What are the 3 things you LIKE MOST about your job or work environment?

What are the 3 things you LIKE LEAST (frustrations) about your job or work environment?

Do you feel you have adequate training, tools, and resources to perform your job at the highest level?

Yes | No | Unsure

In regard to the functioning of the business, what do you believe the business should START doing?

In regard to the functioning of the business, what do you believe the business should STOP doing?

Team members are given the opportunity to provide personal perspective on their likes, frustrations, training, and suggestions for improvement.

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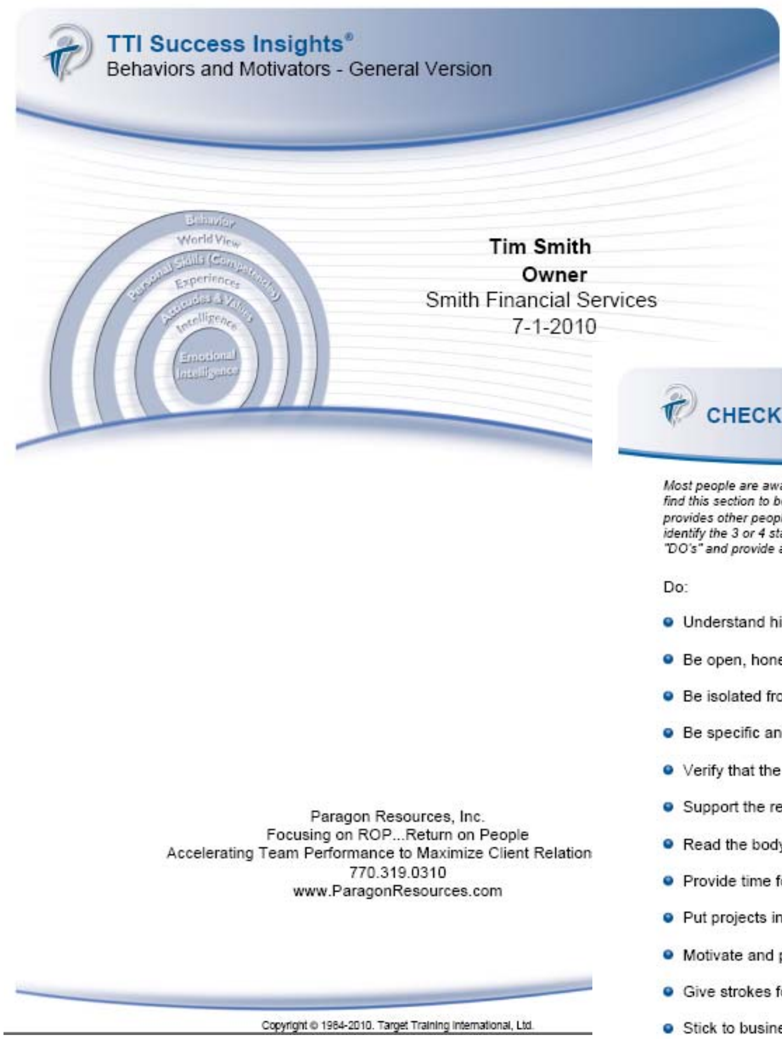
Step 3: Analysis & Summary

Deliverables:

- Behaviors and Motivators Assessments
- Team Success Insights Wheel and Team Motivators
- Team Performance Assessment Team Report
- Business Performance Assessment Team Report

With this information, teams will be able to assess their current overall performance and identify the specific gaps that need to be closed in order to obtain their ultimate business vision.

Behaviors and Motivators Assessment



TTI Success Insights®

Behaviors and Motivators - General Version

Tim Smith

Owner

Smith Financial Services

7-1-2010

Paragon Resources, Inc.
Focusing on ROP...Return on People
Accelerating Team Performance to Maximize Client Relation
770.319.0310
www.ParagonResources.com

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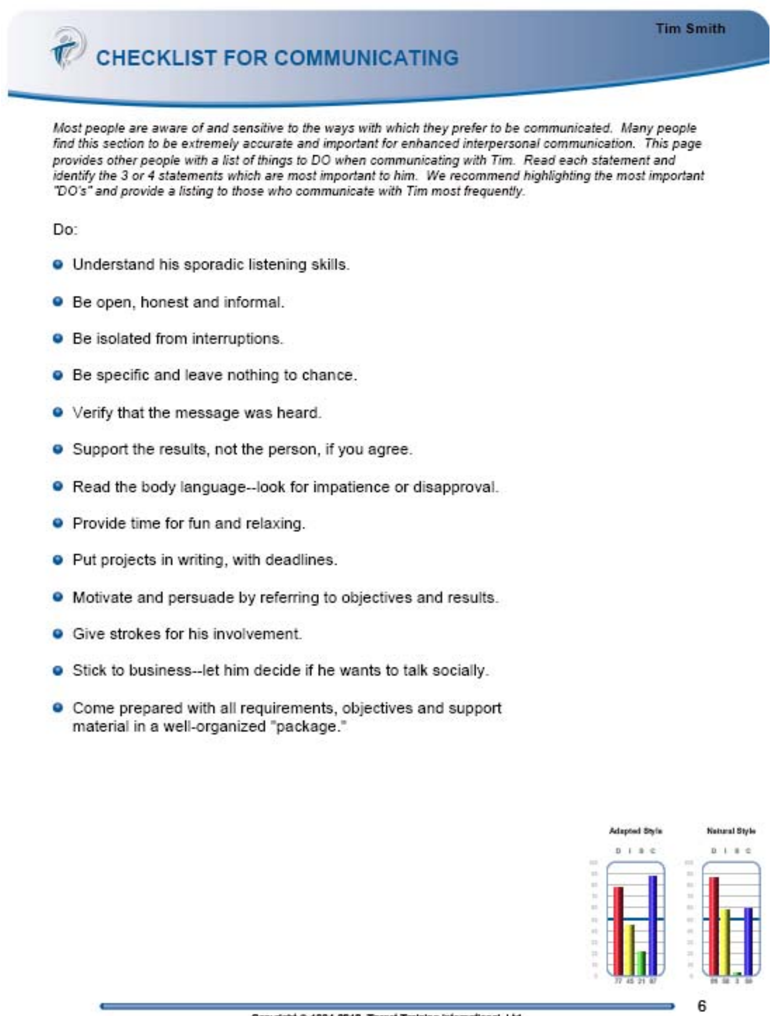

Tim Smith

CHECKLIST FOR COMMUNICATING

Most people are aware of and sensitive to the ways with which they prefer to be communicated. Many people find this section to be extremely accurate and important for enhanced interpersonal communication. This page provides other people with a list of things to DO when communicating with Tim. Read each statement and identify the 3 or 4 statements which are most important to him. We recommend highlighting the most important "DO's" and provide a listing to those who communicate with Tim most frequently.

Do:

- Understand his sporadic listening skills.
- Be open, honest and informal.
- Be isolated from interruptions.
- Be specific and leave nothing to chance.
- Verify that the message was heard.
- Support the results, not the person, if you agree.
- Read the body language--look for impatience or disapproval.
- Provide time for fun and relaxing.
- Put projects in writing, with deadlines.
- Motivate and persuade by referring to objectives and results.
- Give strokes for his involvement.
- Stick to business--let him decide if he wants to talk socially.
- Come prepared with all requirements, objectives and support material in a well-organized "package."

Adapted Style — Natural Style

6

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UTILITARIAN/ECONOMIC

Tim Smith

Keys to Managing and Motivating

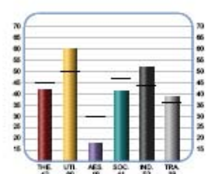
- Assure that economic rewards are fair, clearly communicated, and provide a high-end return for those willing to work for them.
- Be aware that for those who score in this very high range there is a potential for low company loyalty. Be certain to reward performance, and encourage participation as an important member of the team.
- Provide substantial room for financial rewards for excellent performance.
- Provide coaching to help Tim appreciate that not everybody is highly-motivated by wealth, return-on-investment and gain like he is.
- Be certain Tim is balancing his professional and personal life.

Training, Professional Development and Learning Insights

- If possible, build in some group competition as a part of the training activities.
- Link learning outcomes to the ability to become more effective in increasing earnings for both himself and the organization.
- Scores like those who want information that will help them increase bottom-line results and effectiveness.

Continuous Quality Improvements

- Within this very high economic drive, there is a significant motivating factor in achieving goals. It may also become an insatiable need, especially in sales people and others sharing this very high economic drive.
- Needs to learn to appreciate that not everybody is highly-motivated by wealth, return-on-investment or gain so as not to alienate a prospect, customer or client.
- Needs to work on balancing other Values scales and appreciating the strengths that others bring, even those who may not share this very strong Utilitarian/Economic drive.



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Each team member receives personalized reporting on:

- Effective communication
- Keys to managing and motivating
- Time wasters
- Workplace needs
- Team chemistry
- Workplace stressors

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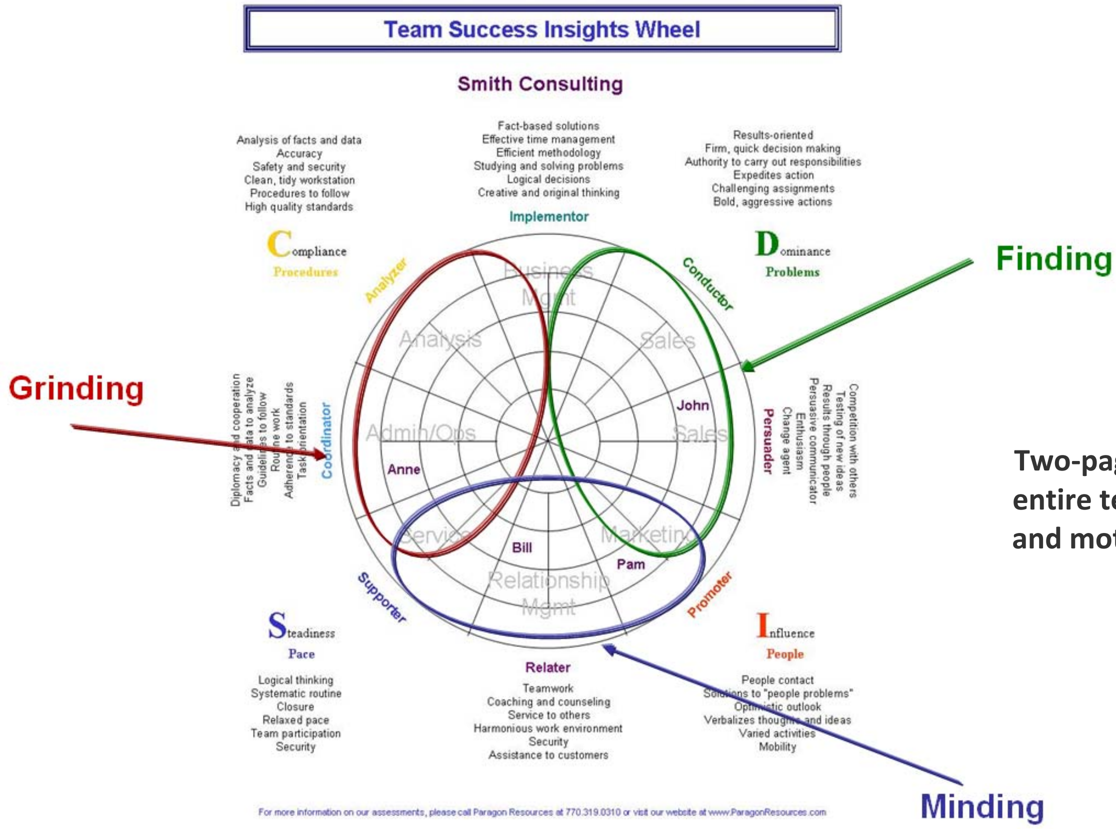
Team Success Insights Wheel and Team Motivators

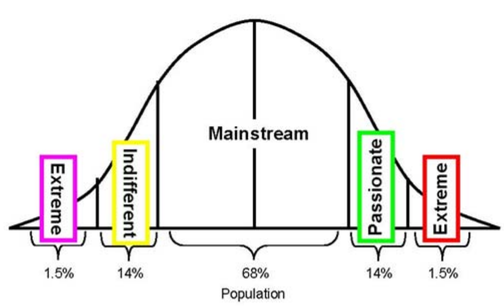


Two-page composite of entire team's behaviors and motivators reports.

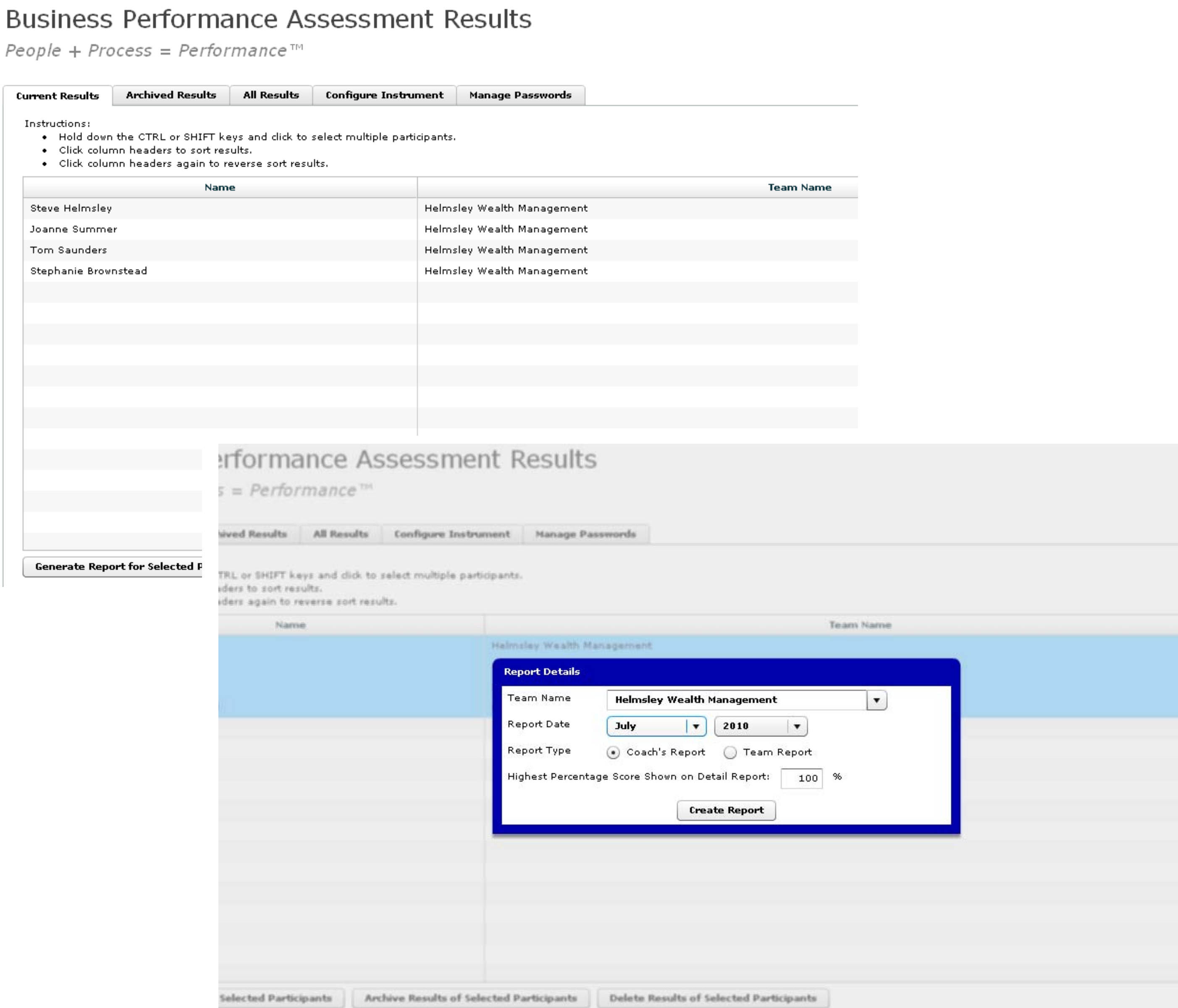
Smith Consulting: Team Motivators

	1	2	3	4	5	6
	Strong		Situational		Indifferent	
John	Utilitarian	Social	Individualistic	Theoretical	Traditional	Aesthetic
Pam	Utilitarian	Traditional	Social	Theoretical	Aesthetic	Individualistic
Bill	Social	Utilitarian	Traditional	Individualistic	Theoretical	Aesthetic
Anne	Social	Utilitarian	Theoretical	Traditional	Individualistic	Aesthetic

THEORETICAL: search for or pursuit of knowledge and learning. **Interests:** continuing education, training, lifelong learning, research and analysis.
UTILITARIAN: utilization of time, money, and resources to achieve a measurable return on investment. **Interests:** practicality, efficiency, conservation.
AESTHETIC: appreciation and pursuit of form, harmony, beauty, and balance. **Interests:** personal growth, nature, fine arts, self-help, creativity.
SOCIAL: desire to eliminate pain and conflict. **Interests:** helping others, championing worthy causes, charities, community activities, volunteer work.
INDIVIDUALISTIC: pursuit of power to lead, direct, and control self and others toward success. **Interests:** leadership roles, strategizing, authority.
TRADITIONAL: search for the highest meaning of life. **Interests:** religion, principled-living, converting others to a system for living, upholding traditions.



Administrative Site



Two Types of Reports Available:

1. **Coach**: includes identity of all responses for coach's/manager's/consultant's insight
2. **Team**: no identity of responses, allows for anonymity

Team Performance Assessment

Helmsley Wealth Management

July 2010

Team Report

Report Developed by Performance Insights, Inc.
Partnered with Paragon Resources, Inc. and Know No Bou
http://www.PerformanceInsights.com
info@PerformanceInsights.com
770.319.0310

- **360 Degree Feedback of TEAM Dynamics**
- **61 Pages**
- **Summary Analysis**
- **Hierarchy of Strengths**
- **Individual Comments and Suggestions**
- **Detailed Reporting of Responses with Suggestions**

Within each of the four areas, the team is categorized into their appropriate levels of performance:

1. **High Performance**
2. **Functional**
3. **Potential**
4. **Challenged**

Overview

What's in this Assessment?

• Below is a summary of your team's overall results in the core elements of team performance. Each element is then categorized or scored for team performance.

• On pages 6-9, you will find what the team believes are its Strengths, Functional Areas, and Challenges. Items higher on each page indicate proficiency. As you move down each list you will find your areas that are in need of improvement.

• During the collection of the data, team members were provided areas to add comments and suggestions. You will find these responses on pages 10-13.

• Finally, pages 14-61 provide a pie chart visual for how team members responded to each question. Also provided is a Team Evaluation statement for the team's result indicating suggestions for improvement or areas to build on. On the bottom of each page, you are provided with an area to write Coaching Notes you may receive during your debriefing.

Summary	Score	Team Classification
Interpersonal	70%	Potential Team
Structure	47%	Challenged Team
Management	58%	Potential Team
Leadership	77%	Functional Team
Overall	**63%**	**Potential Team**

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Leadership Results

Leadership

How the team is led, directed, and encouraged to perform.

Below are your team's results:

Strengths

According to the input from the team, there are no results in this area.

Functional Areas

Realize(s) that he/she needs the team members to achieve goals

Challenges

Plan(s) well ahead of time to minimize last minute surprises

Empower(s) members to make appropriate decisions

Inform(s) the team on how well it is doing

Follow(s) through on commitments

Acknowledge(s) his/her own weaknesses

Use(s) constructive feedback to improve individual performance

Provide(s) opportunities to team members for professional development

Encourage(s) open discussion with team members

Adapt(s) his/her behavior to work well with the team members

Encourage(s) a stress-free, fun and engaging environment

Fairly compensate(s) team members for their contributions

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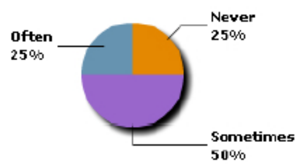
Rank order of team strengths

Structure (detail)

Utilize the talents of each team member



Team Evaluation

The team feels there are members who are not being utilized for their highest and best use or are in roles that do not fit their natural abilities. Each team member's natural behavioral style renders them well suited for certain roles and responsibilities. When a person's style is inconsistent with their job, the result is usually a person who may not enjoy their position or is not fully energized by the work they do. This can lead to stress, frustration, procrastination, or less than stellar performance. In some more extreme cases, individuals may even experience health concerns due to the high level of stress. Review each team member's DISC assessment to ensure you are fully utilizing their talents and matching their job responsibilities to the work that energizes them. Then also look at their Workplace Motivators to make sure the work environment and team culture supports their interests and needs. Finally, utilize these assessments for potential career paths for team members.

Coaching Notes

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Detailed report on each question with suggestions for improvement

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Business Performance Assessment Team Report

Business Performance Assessment

Helmsley Wealth Management
July 2010

Coaching Report

Report Developed by Performance Insights, Inc.
Partnered with Paragon Resources, Inc. and Know No Bounds, LLC
http://www.PerformanceInsights.com
info@PerformanceInsights.com
770.319.0310

- **360 Degree Feedback on BUSINESS Dynamics**
- **28-84 Pages, Depending on Reporting Options**
- **Summary Analysis**
- **FIND-GRIND-MIND™ Analysis**
- **Resource Analysis**
- **Strengths and Challenges**
- **Action Items**
- **People + Process = Performance™ Inventory**
- **Detailed Reporting of Responses**
- **Individual Comments and Suggestions**

Introduction
What's in this Assessment

In this report, we have taken feedback from each of your team members to provide you with a complete assessment of your core business functions. This report will help you identify areas of weakness that should be addressed and provides you with a roadmap for achieving further successes in your business.

The report contains the following analysis:

Section I: Team Member Profile
This is an overview of the current team members who completed this assessment of your business.

Section II: FIND-GRIND-MIND™ Functional Analysis
Here you will find your team's input on the building blocks of your business and the specific scores for each of the seven functions that have been rank ordered from highest to lowest in terms of efficiency and effectiveness. All team members were also given the option to provide additional comments or notes to clarify any of their responses when completing the assessment.

Section III: Resource Analysis
In this section we provide detailed information on how time is currently spent in your practice, your team's opinion of how the business is functioning, and an overview of how many team members feel that they have adequate training, tools, and resources to perform their job.

Section IV: Strengths and Challenges
Your team provided input on what they feel are the most positive work environment attributes and their current frustrations.

Section V: Action Items
This section provides the top ideas that your team believes you should START implementing in your business and those elements that they believe you should STOP doing if you want to improve performance.

Section VI: Action Plan to Increase Business Performance
People + Process = Performance™ Inventory
Additional tools to assist in your team's development is found in this section. Use the inventory as a checklist to determine if you have the essential elements of most successful advisory practices.

Section VII: Detailed Response Report
We have included an overview of how the team responded to each question posed in the "Yes/No/Unsure" and "Always/Sometimes/Rarely/Never" analysis of your business. Please use this information to note areas for the team's development and to properly educate team members to ensure there is a consistent understanding of the practice

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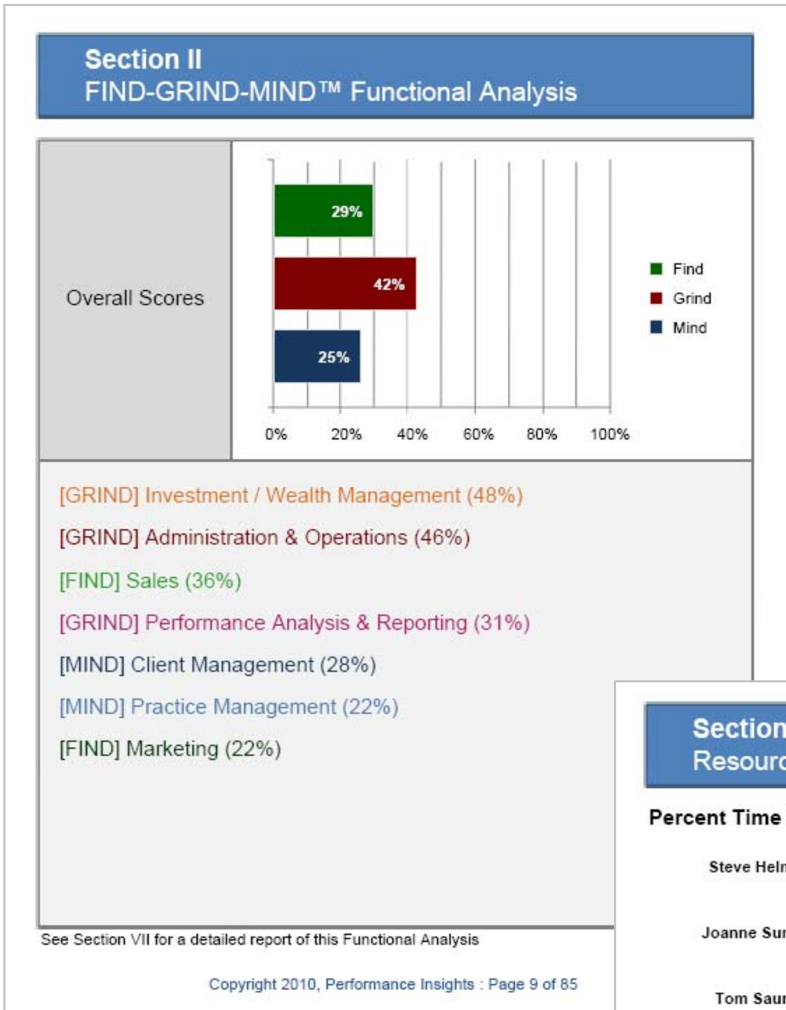

Section II
FIND-GRIND-MIND™ Functional Analysis

[GRIND] Investment / Wealth Management (48%)

[GRIND] Administration & Operations (46%)

[FIND] Sales (36%)

[GRIND] Performance Analysis & Reporting (31%)

[MIND] Client Management (28%)

[MIND] Practice Management (22%)

[FIND] Marketing (22%)

See Section VII for a detailed report of this Functional Analysis

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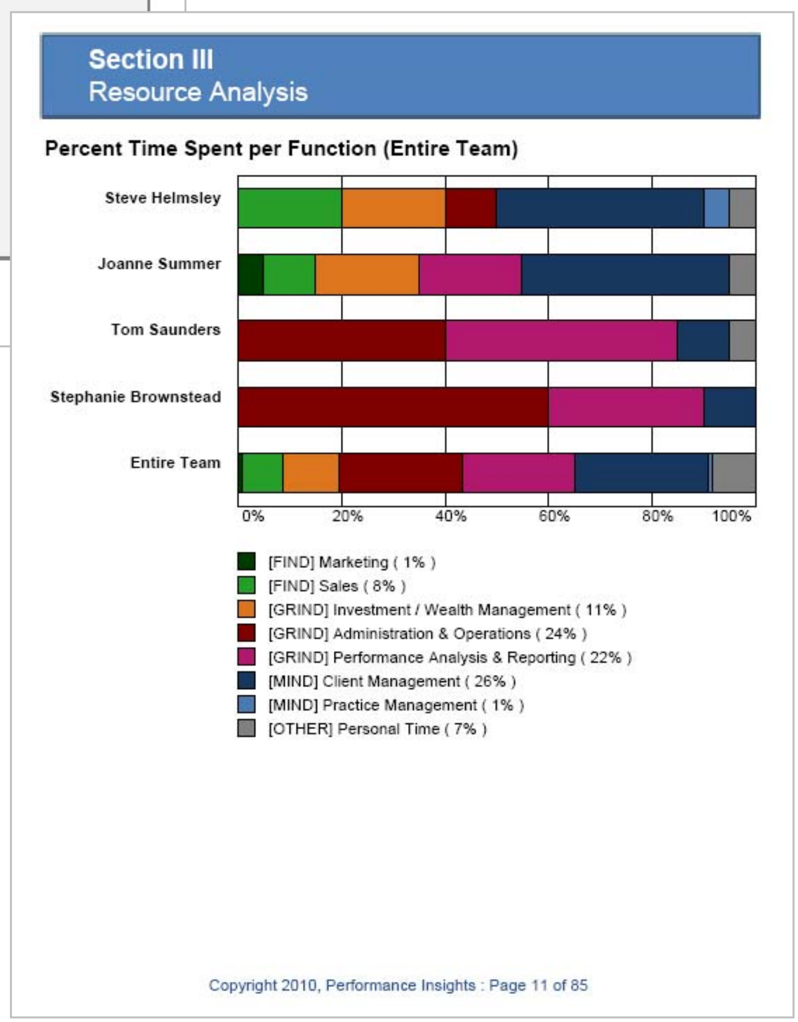
Team's feedback on how they are functioning in each core area of the business



Section III
Resource Analysis

Percent Time Spent per Function (Entire Team)

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Analysis of time spent in each function of the business

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Section VI
People + Process = Performance™ Inventory

FIND

Functions: Sales and Marketing

Finding Processes:
Client Attraction: Delineates how you promote and market your business and your services to identify new IDEAL prospects.

Client Conversion: Describes how you convert a qualified prospect into an IDEAL client.

Included within this building block are these key elements:

- ❑ Written, comprehensive "Ideal Client Relationship Definition"
  - ❑ Positioning Tools
  - ❑ Elevator speech and differentiating story
  - ❑ Printed/electronic marketing brochure (brief and comprehensive)
  - ❑ Printed/electronic presentation book
  - ❑ Articulate points of distinction and answer to the question "why should I do business with you?"
  - ❑ Branding
- ❑ Client Acquisition Strategies (lead generation)
  - ❑ Referral-based (clients and centers of influence)
  - ❑ Organic growth (increase wallet-share)
  - ❑ Traditional marketing (the people who don't know you yet)
- ❑ Fact Finder / Prospect Discovery Form
- ❑ Communication Plans
  - ❑ Pipeline
  - ❑ COI – Centers of Influence
- ❑ Community Service

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Inventory checklist of all of the FIND-GRIND-MIND™ functions

Section VII
Detailed Results

[Mind] Client Management

Team Rating: 50%
Actively capture personal client information (interests, hobbies, passions, dreams, desired legacy, etc.)

Responses
ALWAYS: 0 Responses
[-]

SOMETIMES: 3 Responses
[ABC]

RARELY: 0 Responses
[-]

NEVER: 1 Responses
[D]

UNSURE: 0 Responses
[-]

Comments
Joanne collects this information but I forget all the time. - Steve Helmsley

Steve no; Joanne, yes. - Tom Saunders

Coaching Notes

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Detailed report on each question with suggestions for improvement

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Understanding the Analysis – Creating a Plan of Action
It is suggested that the team review the results of the Performance Insights Process™ over a minimum of three facilitated discussions. Know No Bounds and Paragon Resources offer train-the-trainer programs and companion facilitators guides to assist your firm in developing the expertise needed to effectively facilitate these discussions. We also can offer these services for you by telephone.

The foundation of these consultations is to provide insight and tangible strategies on how to make wiser decisions for the growth of the practice. Below is a suggested plan:

Please note session one, People Awareness, includes all participants in the process. Due to the potentially sensitive nature of sessions two, Business Awareness, and three, Growth Plan, we suggest the Principal(s) are best suited to determine who should participate. These sessions often include the sharing of confidential information and we want to encourage open and honest communication throughout.

Session 1: People Awareness
Entire Team
Time Commitment: 90 minutes
Professional consultation to help you interpret the Strengths and Motivators Assessments and to better understand each person's intended role in the practice and their individual work place needs. This is a highly interactive call that includes all participants in the process. We focus on PEOPLE first as they are truly the foundation of your business success.

Session 2: Business Awareness
Principal(s) Determine Attendance (Due to the sensitive nature of sharing confidential information)
Time Commitment: 60-90 minutes
Professional consultation to assess the current state of your practice. We will utilize the information provided in the Business Profile and the Team and Business Performance Assessments as described above. The primary focus of this session is to discuss the efficiency and effectiveness of each of your business functions.

Session 3: Growth Plan
Principal(s) Determine Attendance (Due to the sensitive nature of sharing confidential information)
Time Commitment: 60-90 minutes
This session focuses on moving from awareness to action. To help you achieve your ultimate vision, we will transform the information uncovered throughout the process into a series of suggested critical action steps. Topics of discussion usually include:

- role definition and ideal team structure
- strategies to increase profitability and client loyalty
- techniques to empower team members
- processes to eradicate inefficiencies
- identification of future people resource needs
- effective communication strategies
- guidance on making tough decisions
- proven practice management habits

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Who is this Program For?

Teams: Our definition of a team is three or more professionals or support members working together. This more complex structure may experience symptoms such as:

- Interpersonal conflict among team members
- Unclear role definition
- Inefficient or non-existent processes and systems
- Unclear vision and direction
- Poor communication and low team morale
- Stalling of the business or hitting a plateau
- Growing pains
- Inefficient usage of time
- Need to know when to add staff or partners / professionals
- Cleaning up an overweight business – too many clients; too many models; trying to be all things to all people
- Being reactive versus proactive in daily activities
- Lack of formalized service model for your clientele
- Wanting to change your business model to fit a new market
- Not enough time to market and gain new business
- Not enough time to service all client relationships

Top Producing Teams: Provide a value-added tool to your firm's top producing teams. They can use this comprehensive analysis for defining new goals to improve all aspects of the practice. This advisor retention tool demonstrates your commitment to their continued success.

Emerging Advisory Teams: Invest in the firm's future by developing your bench players. These tools can provide the insight needed for those advisors who have hit a plateau in their business. Allows the advisors to create a specific action plan to streamline the practice for increased profitability.

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