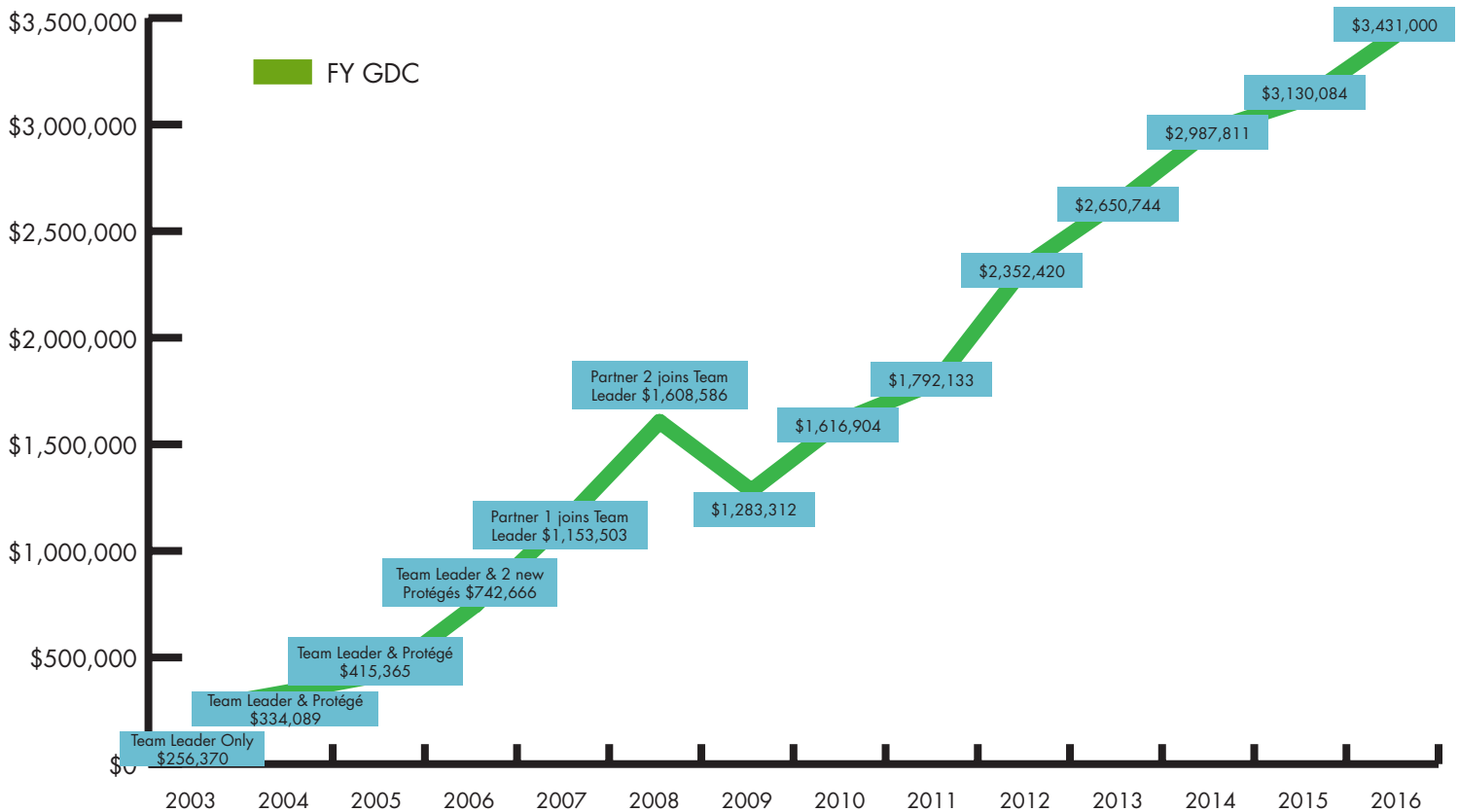


TEAM GROWTH MODEL



TEAM BEST PRACTICES

- Tiered Clientele with specific client service models for each tier
- Common financial planning processes in place for new and existing clients
- Operational, Business and Marketing Plans in place and reviewed quarterly/annually with all team members
- All Team members accountable to agreed upon new client acquisition – reviewed monthly/quarterly/annually
- Weekly accountability meetings with all infrastructure and team members
- Collaborately work with Firm leadership and infrastructure to capture best practices and alignment of Firm resources with team's business/growth plan

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