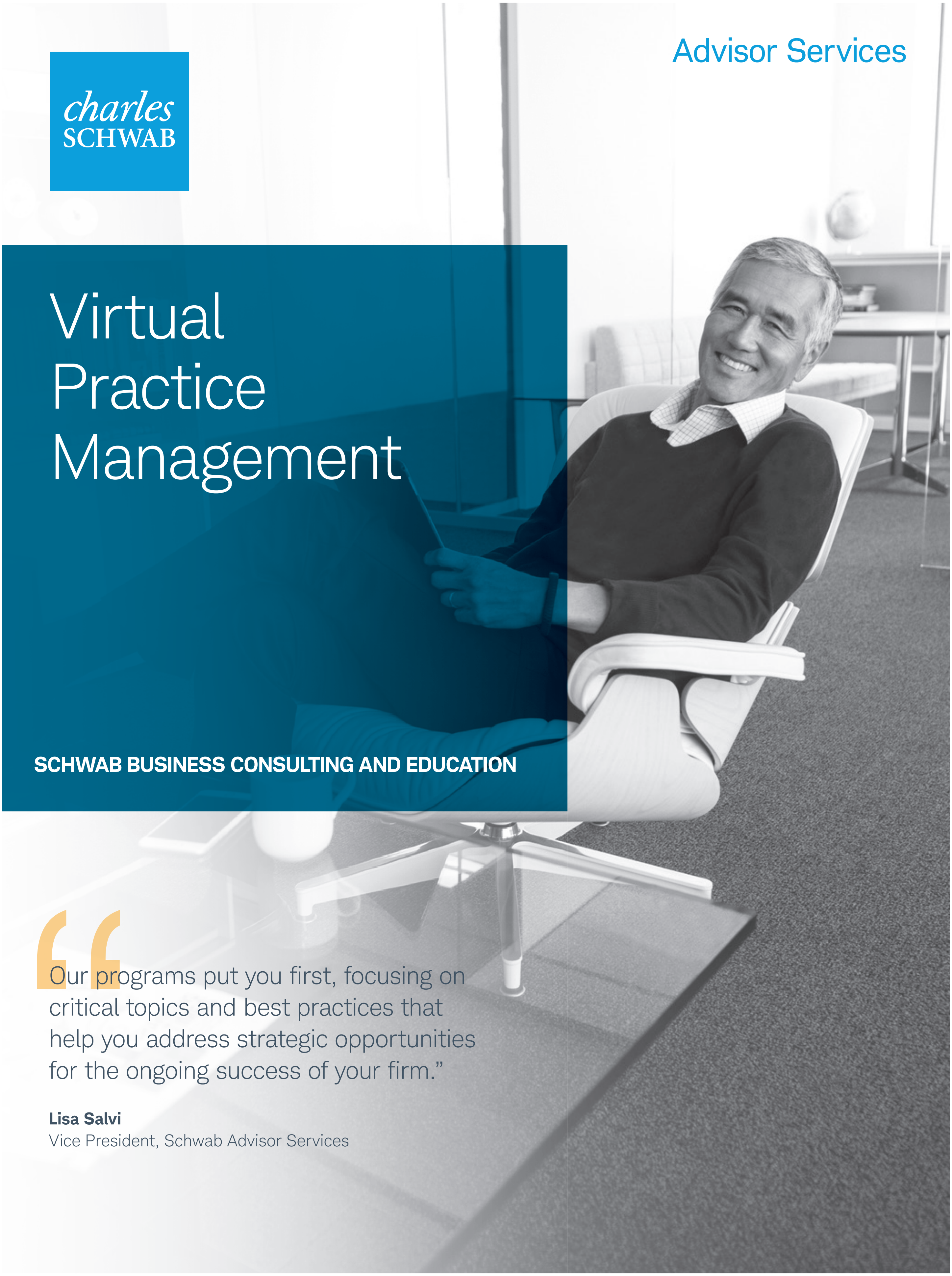
Advisor Services

Virtual Practice Management

SCHWAB BUSINESS CONSULTING AND EDUCATION



"Our programs put you first, focusing on critical topics and best practices that help you address strategic opportunities for the ongoing success of your firm."

Lisa Salvi
Vice President, Schwab Advisor Services

Growth on your terms

Virtual Practice Management programs empower you to improve and grow your business with strategic guidance delivered through flexible and intuitive learning experiences. Designed specifically for independent advisory firms, our programs allow you to choose from topics that are the most valuable and timely for your firm.

These programs follow a dedicated process that begins with foundational insights and leads to inspired vision and effective execution. By providing opportunities to engage with Schwab experts and fellow advisors, and offering actionable insights with supporting tools and resources, our programs empower you to create lasting purposeful change within your firm.

Benefits

- High quality practice management guidance
- The collective expertise of trusted Schwab thought leaders and industry best practices
- A flexible and intuitive guided learning experience to fit your schedule
- Engagement with Schwab and fellow advisors in a cohort-style environment
- Actionable insights with supporting tools and resources
- Empowerment to create positive sustainable change within your firm

A guided learning journey

Virtual Practice Management programs

Forming Your Foundation

Defining value through your clients' eyes is critical to the success of your business and helps set you on a course for sustained growth. In fact, according to our RIA Benchmarking Study, firms who have documented their ideal client persona and client value proposition attract 26% more clients and 41% more new assets than firms without these tools.[1]

Forming Your Foundation is a set of two programs: Ideal Client Persona and Client Value Proposition.

Ideal Client Persona

Understanding who you are best suited to serve optimizes your client experience and supports purposeful growth by attracting more clients like them.

- Learn how to create a strong ideal client persona by profiling your firm's best clients and then bring their most desirable qualities together in a persona that represents your ideal client.
- Understand how to activate your ideal client persona within your firm.

Client Value Proposition

Establishing a client value proposition enables you to see through your ideal clients' eyes and make meaningful connections between the logical and emotional reasons a client would choose your firm over another – and why they stay.

- Leverage your ideal client persona to define your firm's value through their eyes.
- Learn how to create a strong client value proposition and establish tangible next steps to attract more ideal clients.

Ideal Client Persona is a prerequisite to the Client Value Proposition program.

More programs coming soon

We are actively designing new programs to help you grow your business and reach strategic goals.

Visit **SchwabAdvisorUniversity.csod.com** to learn more about Virtual Practice Management programs.

"Virtual Practice Management encouraged us to ask questions we hadn't previously contemplated. Now we're looking at our growth from a new point of view and that brings great value to our firm."

Peter D'Agati
Founder and President
Stembrook Asset Management LLC

The power of insight

For more than 20 years, the Schwab Business Consulting and Education team has been working hand in hand with RIAs, leveraging our deep expertise in core business issues to help independent advisory firms achieve their goals and gain competitive advantage.

Invest in your growth

Propel your firm forward with strategic practice management programs and resources.

Discover insights and take action to drive your business to new levels of success.

[1] 2018 RIA Benchmarking Study from Charles Schwab, fielded January to March 2018. Study contains self-reported data from 1,261 firms. Participant firms represent various sizes and business models categorized into 12 peer groups–7 wealth manager groups and 5 money manager groups–by AUM size. Median results for all firms with $250 million or more in AUM. Past performance is not an indicator of future results.

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