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The Ensemble Practice works with independent advisors to build and grow ensemble firms. Ensemble Defined Ensemble advisory firms operate as multiprofessional practices, sharing stewardship over client relationships and leveraging the collective talent of the team to achieve business goals.

The Ensemble Practice | We Build Successful Firms

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About the Author. Philip Palaveev is a financial industry expert and consultant focused on improving the profitability and value of financial services firms. The owner and CEO of The Ensemble Practice LLC, a management consulting firm helping financial advisors build better businesses, Palaveev also works with broker-dealers and custodians to create impactful practice management services for ...

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The Ensemble Practice: A Team-Based Approach to Building a ...

The Ensemble Practice: A Team-Based Approach to Building a Superior Wealth Management Firm. P. Palaveev. ISBN: 978-1-118-20954-7. 240 pages. October 2012. Read an Excerpt . Description. A detailed road map for wealth managers who want to build an ensemble firm or team and achieve sustained growth, profitability and high valuations ...

Wiley: The Ensemble Practice: A Team-Based Approach to ...

Teams have replaced solo advisors as the organizational foundation of the most successful advisory firms. However, the financial advisory industry has yet to clearly define the path from a successful solo practice to a mature and thriving team-based firm. Advisors need the right tools at hand—and the knowledge required to wield them effectively—to build and grow their practices into successful and sustainable ensemble firms.

About Us | The Ensemble Practice

Forward-thinking advisors are now working together, developing "ensemble" firms that bring together a team of experts to provide clients with superior service. These firms are the way of the future, and in *The Ensemble Practice: A Team-Based Approach to Building a Superior Wealth Management Firm*, industry expert Philip Palaveev explores how to build and sustain a profitable, successful practice.

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Find out how and why a team-based service model can play a decisive role in the future growth and sustained success of your wealth management firm Discover the key factors for building a successful ensemble firm and profit from the best practices top team-based firms employ Profit from the author's years of experience working with the world's ...

The Ensemble Practice: A Team-Based Approach to Building a ...

In this episode, we talk in depth about the concept of an “ ensemble practice ” , the different ways that advisors can share office, staff, clients, profits, and ultimately equity in becoming a multi-professional advisory firm, and what it really means to create an advisory business that puts the interests of the business before the interests of any one advisor partner... along with why, as the business grows, it becomes crucial to create a means of quality control to ensure that, with ...

Building A True Ensemble Advisory Practice w/ Philip Palaveev

Philip Palaveev is a financial industry expert and consultant focused on improving the profitability and value of financial services firms. The owner and CEO of The Ensemble Practice LLC, a management consulting firm helping financial advisors build better businesses, Palaveev also works with broker-dealers and custodians to create impactful practice management services for their advisors.

The Ensemble Practice | Wiley Online Books

Packed with everything you need to know to construct a top team, The Ensemble Practice

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Teaches the importance of a sharing, trusting, and respectful culture of partnership—and how to use these values to build a firm that can weather any storm.

The Ensemble Practice: A Team-Based Approach to Building a ...

The ensemble practice : a team-based approach to building a superior wealth management firm. [Philip Palaveev] -- A detailed road map for wealth managers who want to build an ensemble firm or team and achieve sustained growth, profitability and high valuationsWhy do ten percent of wealth management firms grow ...

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A detailed road map for wealth managers who want to build an ensemble firm or team and achieve sustained growth, profitability and high valuations Why do ten percent of wealth management firms grow faster than the rest of the industry, often despite the turbulence of the markets? The answer, according to industry consultant and researcher, P. Palaveev, is that the most successful firms are those which, create and promote a team-based service model that serves as the foundation of their enterprise. Find out how and why a team-based service

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model can play a decisive role in the future growth and sustained success of your wealth management firm Discover the key factors for building a successful ensemble firm and profit from the best practices top team-based firms employ Profit from the author's years of experience working with the world's top wealth management firms and the data he has compiled as a pre-eminent industry researcher Learn about the various organizational structures, partnership models and career path options and how to put them to work building an ensemble practice Get the lowdown on how the savviest traditional broker-dealer firms have formed dynamic ensemble teams within their organizations and learn of the results they've achieved

A detailed road map for wealth managers who want to build an ensemble firm or team and achieve sustained growth, profitability and high valuations Why do ten percent of wealth management firms grow faster than the rest of the industry, often despite the turbulence of the markets? The answer, according to industry consultant and researcher, P. Palaveev, is that the most successful firms are those which, create and promote a team-based service model that serves as the foundation of their enterprise. Find out how and why a team-based service model can play a decisive role in the future growth and sustained success of your wealth management firm Discover the key factors for building a successful ensemble firm and profit from the best practices top team-based firms employ Profit from the author's years of experience working with the world's top wealth management firms and the data he has compiled as a pre-eminent industry researcher Learn about the various organizational structures, partnership models and career path options and how to put them to work

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building an ensemble practice Get the lowdown on how the savviest traditional broker-dealer firms have formed dynamic ensemble teams within their organizations and learn of the results they've achieved

Financial planning is a young industry. The International Association of Financial Planning—one of the predecessors to the Financial Planning Association—was formed less than forty years ago. But as the profession's first tier of advisers reaches maturity, the decisions that may be part of transition planning for their firms loom large. A sale? A partner buyout? A merger? No matter what the choice, its viability hinges on one critical issue—the value of the firm. Unfortunately, many advisers—whether veteran or novice—simply don't know the worth of their practice or how to influence it. That's why *How to Value, Buy, or Sell a Financial-Advisory Practice* is such an important book. It takes advisers carefully through the logic and the legwork of coming to a true assessment of one of their most important personal assets—their business. Renowned for their years of experience helping advisers tackle the daunting challenges related to the valuation, sale, and purchase of advisory firms, Mark C. Tibergien and Owen Dahl offer guidance that's essential and solutions that work.

A revised and expanded look at how to thrive and prosper in the financial advisory business A new and revised edition of the eye-opening, no-nonsense handbook on managing and growing a financial-advisory business, *Practice Made (More) Perfect* is packed with industry insight and practical ideas that every leader and manager within a financial advisory practice needs to know in order to get the most out of their business. Regardless of how little time is available or

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How seriously challenged a firm may be, this book contains the information that can help. The principles of sound management apply to firms of all types, and the tools provided in this book are guaranteed to be applicable under practically any circumstances. Written by industry expert Mark Tibergien, one of the "25 Most Influential" people in the financial services industry A new edition of a bestselling Bloomberg title Includes fresh insight on recent topics, including how advisors responded during the latest meltdown, the implications of the aging advisory profession, the challenges of attracting and keeping both clients and staff, the role of organizational design in a growing business, recent changes in compensation planning and implementation, and key information on leadership and management in today's financial world Many financial advisers run their businesses as if acquiring more clients will solve any and all problems, but without a strategic framework, more clients just lead to more demands and less time to meet them. The truly successful firm will build strategy, structure, and processes that will ultimately translate into increased profits, cash flow, and transferable value.

Vital guidance to ensuring the future of your firm G2: Building the Next Generation provides financial advisory firms with a clear roadmap to management succession. Based on the author's 17 years of experience with over 1,000 firms, this book provides a systematic process to help you identify, develop, and install the new leadership that will guide your firm's future. Extensive statistical research backs proven strategies for structuring management and succession, overcoming obstacles, selling equity, and more, while expert guidance walks you through the process and warn you of potential pitfalls along the way. A

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Financial generation of entrepreneurs used their talent and ambition to build an industry; to ensure that their success lives on, those leaders now face the formidable challenge of succession. With the future of your firm at stake, how do you recruit, train, mentor, and develop the next generation of professionals, owners, and leaders? This book shows you how to find the people you need, and develop them into the leadership your firm deserves. Identify and develop future leaders from the pool of existing and upcoming talent Structure management and management succession to ensure successful transition Begin selling equity to your firm's next generation of leaders Learn smart strategies for dealing with setbacks along the way The next generation of leaders will shape the future of your firm, but collectively, they will define the future of the entire advisory industry. Firms who succeed in developing their best talent will continue to thrive—those who fail will be left with a great car, but no driver. Getting this right may be one of the most critical points of your career, and it isn't something that should be left to chance or "gut feeling". G2: Building the Next Generation gives you a solid, grounded, systematic approach for ensuring your firm's long-lived success.

This book is going to challenge you and everything you think you know about succession planning. For independent advisors, succession planning is quickly becoming the cornerstone to a strategic growth strategy designed to perpetuate their business and their income streams beyond their own lifetime, while providing a multi-generational service platform that attracts and rewards younger advisors. This makes succession planning one of the most, if not the most, important practice management tools in this industry today. As an independent financial advisor, now is the time to address the question of what will happen to your practice

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and your clients after you “ exit the building. ” In most cases, the answers are right in front of you. Thankfully, *Succession Planning for Financial Advisors: Building an Enduring Business* has arrived to transform today ’ s practices into businesses designed to endure and prosper and serve generations of clients. Learn how to create a “ Lifestyle Succession Plan ” that can provide a lifetime of income and benefits to the founder even as he/she gradually retires on the job Unlock the power of equity management – the best planning and building tool an independent advisor owns Learn how to attract and retain the best of the next generation to help you build a great business and to support your succession plans and care for your clients and their families Determine precisely when to start a formal succession plan and related continuity plan so that your business can work for you when you need it most Understand why succession planning and selling your business are completely different strategies, but how they can complement each other when used correctly 95% of independent financial service professionals are one owner practices. To the positive, these practices are among the most valuable professional service models in America. But almost all advisors are assembling their practices using the wrong tools – tools borrowed from historically successful, but vastly different models including wirehouses, broker-dealers, and even OSJ ’ s and branch managers. Revenue sharing, commission splitting and other eat-what-you-kill compensation methods dominate the independent sector and virtually ensure that today ’ s independent practices, if left unchanged, will not survive the end of their founder ’ s career. It is time to change course and this book provides the map and the details to help you do just that. For independent practice owners and staff members, advisors who want to transition to independence, as well as accountants, attorneys, coaches and others involved in the financial

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services space, there are invaluable lessons to be learned from Succession Planning for Financial Advisors. Written by the leading succession planning expert in the financial services industry, former securities regulator, M&A specialist, and founder of the nationally recognized consulting and equity management firm, FP Transitions, David Grau Sr., JD, has created an unmatched resource that will have an enduring and resounding impact on an entire industry.

The #1 way to start getting referrals? STOP ASKING In all his years of helping financial professionals build and grow their businesses, Stephen Wershing has learned that the number one way to make sure you don't get a referral is by asking for it. Why? Because studies prove that clients refer you not to benefit you but to benefit themselves. So you have to approach the challenge from a completely new angle. Stop Asking for Referrals helps you do exactly that. Inside, Wershing provides the tools you need to get more referrals than ever by designing your practice in a way that gets clients to mention you to friends when the opportunity arises. He calls it "the new referral conversation," and it works. Define your target market with accuracy and precision Communicate your value clearly and effectively Create your company's unique "brand" Harness the natural, normal social interactions of your clients to serve your marketing efforts You'll also learn how to use client feedback to benefit your business, create your service package, and bring in new business. "The way you have been told to attract referrals is based on an assumption that's wrong," Wershing writes. "And it is undermining your business and your relationships." You will come away with a deep understanding of why and where referrals actually come from, how to tailor your own practice to get people talking about you, and ways to develop a communication plan to

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Project your reputation. So stop asking for referrals--and start attracting more new clients than you ever thought possible. Praise for Stop Asking for Referrals "Steve Wershing helps you unlock the untapped referral potential you have in your business today with an approach that is as comfortable as it is effective." -- JULIE LITTLECHILD, founder and president of Advisor Impact "The most comprehensive, practical, and engaging guide I know of for strengthening existing client connections and cultivating new ones in a way that is experience-based, respectful, and long-lasting." -- OLIVIA MELLAN, psychotherapist, money coach, author of The Client Connection, and columnist for Investment Advisor "Reading this book will revolutionize how you think about growing your business." -- MICHAEL E. KITCES, MSFS, MTAX, CFP, partner, Pinnacle Advisory Group, and blogger, Nerd's Eye View "This book will help you overcome . . . discomfort and show you how to engage your clients so that they will proudly help you build your business. Kudos for this powerful, one-stop marketing resource!" -- SHERYL GARRETT, CFP, AIF, award-winning author, advisor, and founder of the Garrett Planning Network "Stop Asking for Referrals is on my Top Ten list of books that I believe offer the most meaningful strategies for advisors. . . . Steve's ideas for referral marketing are brilliant and just plain common sense. Advisors will embrace his book as the new referral bible. -- SYDNEY LEBLANC, founding editor of Registered Rep magazine; partner of LeBlanc and Company "Embrace Steve's advice if you'd like to see your practice growth become effortless, boundless, and fun!" -- MARIE SWIFT, CEO, Impact Communications, columnist for Financial Planning magazine, and author of Become a Media Magnet

An insightful look at leadership transition from the successor's perspective Success and

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Succession examines the leadership transition process from the successor's point of view, and outlines the considerations and strategies that lead to a better future for the business. With a focus on practical planning and execution, this insightful guide provides insight into the strategies that smooth the transition and help the new leadership make better business decisions. You'll learn when and how to start planning, who you need on your team, and the obstacles you should anticipate along the way. You'll learn to navigate the uncertainty the process entails, and how to identify opportunities for reciprocal understanding and adopt workable approaches for successful resolution of a multitude of transition issues. Interviews with those at various stages of transition highlight the real-world application of these ideas, and give you an inside look at what worked, what didn't, and what they wish they had thought of. The transition of leadership in an independent, non-public professional service business can be emotional and difficult for everyone. This book gives you a framework for smoothing the process and driving the best possible future of the business. Consider the complexities of succession and transition Balance conflicting dynamics of outgoing and incoming leadership Plan for operational, financial, and emotional obstacles Develop and execute a winning strategy for long term success The transition from founder to successor is far from an academic exercise, and is not linear. Answers are hard to find, and the ebb and flow of the process requires patience, creativity, and willingness to try again. Success and Succession provides a unique strategy for success, from the perspective of incoming leadership.

With M&As in the RIA space increasing, many firms are rapidly changing hands with little to no expert guidance on how to successfully execute a merger or acquisition. In 2017, a record

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number of M&A deals closed in the advisor space – 168 transactions, or a 22% growth over 2016. Aside from a fifth straight year of record highs in M&A activity, the size of the acquired firms has also increased, with average acquisitions involving wealth managers exceeding \$1.01 billion in assets under management. For many advisors, it only takes a handful of missteps during a merger or acquisition to jeopardize their business, but with so much unknown, advisors need a guidebook for success. A significant and often overlooked component to a successful RIA merger or acquisition is the thoughtful integration of technology. This comprehensive guide walks you through the steps of strategy, assessment, implementation, adoption and growth, all while considering how to best inspire and galvanize a firm ' s most valuable asset – its people. Combining the real-life experiences of a life-long financial advisor with the expertise of a 15-year operations director and founder of a large RIA ops network, this book takes real M&A experiences of the financial services industry and offers best practices, tools and resources to help advisors make smart decisions about technology integration that elevates the firm ' s goals and solidifies its future success.

Reframe "wealth management" to achieve sustainable success in financial services You've Been Framed™ is a step-by-step guide for achieving ultimate profitability and sustainability for your financial advisory firm. Whether you're a savvy entrepreneur ready to dominate your competitors, or a more experienced advisor moving toward selling your practice, this guide will help you proactively reframe your business. You'll learn how to grow your pipeline of prospects, win the next generation of clients, and deepen your business so it can thrive without you—leaving you free to pursue what matters to you. Build your business on a

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Holistic foundation of wealth management and assemble the team that will take you to the top as you develop a whole new perspective from which to offer your services. Transform your role from "directive advisor" to "trusted advocate." Completely shift the paradigm, and make yourself the de facto solution to your clients' wealth management issues. Whether it's the firm with which you're affiliated or the types of products and services you offer, you've been "framed." As a wealth management advisor, your clients have little understanding of what you do or why you do it. Even your team may have the wrong idea. This book helps you clarify and demonstrate the value of your knowledge and skills, so you can frame your work on your own terms. Build and showcase your enterprise value Renew client relationships and attract new demographics Become a leader with proven team-building tools Shift your role from advisor to advocate If you haven't effectively led discussions to co-create what your business stands for—and what differentiates it from competitors—you're losing talent, prospects, and business. You've Been Framed™ gives you the perspective you need to thrive in the new financial environment, and achieve sustainable success.

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