

Comprehensive Business Development

Financial advice is a fluid industry. The changes in the last ten years are numerous and consequential. Some advisors adjusted and rejigged their business and have done very well. Most did not and have stagnated.

The Comprehensive Business Development program is designed to develop your business and plan for growth and/or a long term succession plan. It includes protecting the value of your business – now and the future and the unexpected.

Advisors know and understand the value of advice. The value of outsourcing responsibilities of their business to get things done properly and on timely basis.

There are five main challenges to building a successful business:

- GROWTH & PROFITABILITY
- MERGERS & ACQUISITIONS
- TEAM BUILDING
- SUCCESSION PLANNING
- PROTECT THE VALUE

Your current goals and objectives may only be 2 or 3 of these challenges at this time. Into the future, you will probably consider all four as an important plank in your business platform.

The key is to have a plan. A roadmap. Part of that is the goals have to be realistic or else they are only dreams. Queenston understands the different business models and business structures which increase value and perpetuate growth and how to prepare you for the next stage of your business.

Cost \$2500 up front and an on-going fee of \$300 / month.

PROCESS

VALUATION – determine the value of your business and the starting point.



EVALUATION – what are the strengths & weaknesses; business structure; business model; recruiting.



STRATEGIC MARKETING PLAN – marketing audit; organic growth plan; acquisition plan; financial projections; bookmarking.



MERGERS & ACQUISITIONS including partnerships, associates and production relationships.



SUCCESSION PLAN – define lifestyle desired; identify successors; continuity plan; exit strategy.



ANNUAL VALUATION – measure how you are doing.