# Mine Your Bliss™

## Custom Onboarding Game Plans

Includes vision-casting, business planning, branding support, and training for advisors and team members. The process is supported by advisors, for advisors, as opposed to Home Office employees.

## The Rain Catcher Referral Process

This process was designed specifically for upper echelon firms working in affluent and well-insulated markets. It has been time-tested over 25-years. It includes comprehensive tools and coaching to increase the quantity, quality and predictability of referral gathering for both senior and junior rainmakers.

## The Humanity Factor™ Unique Story

A proven brand story including a wide array of tools such as Elevator Talk, talking points, touch points, brochures, website and more. Supported by hands-on Brand Coaching to ensure your firm derives ROI from using the tools in your relationships.

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## Cultivate Today™

Our unique planning methodology is a time-tested five-step process. It's supported by our tenured Planning Department utilizing thorough work-flows, a variety of analytical and planning software, and a suite of branded discovery questionnaires and collateral materials. Instead of numbers-first-and-mostly, firms are freed up to focus on the relational aspects of planning.

## Planning Committee

Our Planning Committee is a governing body that proactively drives strategic advancements and work-flow trouble shooting for planning itself, and all supporting disciplines.

## Multi-disciplinary Capabilities

We support firms in offering a diverse set of capabilities. For individuals these include: financial planning, retirement planning, estate planning and investment management. Our life insurance capabilities are fueled by Cedar Brook Insurance, a proprietary underwriting and acquisition process. For companies, our services include retirement plans, employee benefits, business succession planning and strategic planning.

Cultivate Your Contributions™

## Cedar Brook University

Structured workshops, Round Tables and semester-long training modules are taught on a peer-to-peer basis by advisors and team members. CBU also fosters a culture of Learning by Walking Around – real-time collaboration with intellectual peers who specialize in a full complement of planning disciplines.

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## Business Succession Support

A thorough, hands-on process including strategy development, recruiting, transition planning and support, training programs and funding options.

## Practice Management Platform

A highly efficient, effective suite of business management capabilities that allows firms to free-up mind-share for nurturing relationships. We create a custom suite of services at your firm's discretion including operations, compliance, payroll, HR, benefits and office leasing.

The Leadership Lever™

## Integrated Technology Platform

Our in-house IT team provides research, integration and ongoing system management, as well as day-to-day IT support. Platform includes Orion's Big Data Access and Schwab's investment reporting alongside planning software, CRM and cloud hosting at a level that would be cost-prohibitive to many individual firms.

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