

MarketShare Financial

# ADVISOR GROWTH SUMMIT

## Advisor Workbook

*Community · Collaboration · Cultivate*

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8:30 AM – 12:30 PM | Both Days

Name: \_\_\_\_\_

Firm: \_\_\_\_\_

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## DAY 2 — CULTIVATE

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- Succession & Continuity Strategy 9:45–10:30
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- Vendor & Resource Optimization 11:30–12:00
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- 90-Day Strategic Action Plan 12:00–12:30

## How to use this workbook

This workbook is your personal companion for the MSF Advisor Growth Summit. Each section mirrors the agenda — use the lined spaces to capture ideas, complete activities, and record your commitments. The activity pages include step-by-step instructions so you know exactly what to do and when.

# DAY 1

## COLLABORATE

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*Align on vision, identify constraints, and define strategic growth priorities.*

DAY 1

# Opening & Strategic Framing

8:30–8:45 AM

## Why You Were Selected

You are here because you have openly shared feedback, explored growth through succession or continuity planning, and expressed interest in building a stronger practice.

## MSF 2026 Key Initiatives

- Net New Assets
- Operational Efficiency
- Succession & Continuity Planning
- Deepening Relationships with Advisors and Key Vendors
- Annual On-Site or Zoom Regional Manager Meetings

## The 3 C's Framework

<b>Community</b>	A group sharing common interests — social cohesion, interaction, and a shared sense of belonging.
<b>Collaboration</b>	Sharing knowledge, skills, and resources openly — combining diverse perspectives for better outcomes.
<b>Cultivate</b>	Applying time, effort, and care to make something thrive — growing habits, skills, and relationships.

## Partnership Expectations — Notes

### WHAT PARTNERSHIP MEANS TO ME

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### ● ACTIVITY

## Activity: Collaboration Reflection

Opening & Strategic Framing | ~4 minutes total

***“What does collaboration mean in your practice today?”***

1

**THINK**

*1 min*

Reflect on your answer individually — what does collaboration look like day-to-day in your practice?

2

**SHARE**

*2 min*

Turn to the person next to you and share your answer. Listen actively to their perspective.

3

**REPORT**

*1-2 min*

Anyone willing can share a key insight with the whole group.

**MY THOUGHTS ON COLLABORATION IN MY PRACTICE**

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**WHAT I HEARD FROM MY PARTNER / THE GROUP**

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DAY 1

# MSF Strategic Plan & Advisor Alignment

8:45–9:30 AM

## Key Discussion Points

### MSF Growth Strategy

Committed to expanding advisor relationships and accelerating enterprise value across the network.

### Strategic Partnership

What genuine advisor alignment looks like — mutual accountability, transparency, and shared goals.

### Building Synergy

Growing stronger practices through Community, Collaboration, and Cultivation at every touchpoint.

## Notes

### MY NOTES ON MSF'S STRATEGIC DIRECTION

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### ● ACTIVITY

## Activity: Table Reflection

*MSF Strategic Plan & Advisor Alignment | 10 minutes*

In small groups, discuss the following questions:

**Q**  
**1**

*What excites you most about where we're headed?*

### MY ANSWER TO Q1

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**Q  
2**

*Where do you see the biggest opportunity for MarketShare to assist in your growth?*

**MY ANSWER TO Q2**

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**KEY TAKEAWAY TO SHARE WITH THE GROUP**

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*Executive Outcome: Strategic alignment and clarity of shared growth objectives.*

DAY 1  
**Advisor Practice Deep Dive**  
9:30–10:30 AM

This session explores four pillars of your practice:

● ACTIVITY

**Activity: Practice Blueprint Exchange**

Think – Write – Share – Refine | ~30 minutes total

<p><b>1</b></p> <p><b>Individual Build</b> 10 min</p> <p>Complete each prompt below on your own. Be specific and honest.</p>	<p><b>2</b></p> <p><b>Pair Exchange</b> 10 min</p> <p>Share your blueprint with a partner. 4 min each to present, then 1 min of questions.</p>	<p><b>3</b></p> <p><b>Table Synthesis</b> 10 min</p> <p>Share key themes around the room. MSF staff will capture common threads on a poster.</p>
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**Business Model & Niche**

Who do you serve best? What differentiates your practice?

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**Planning Philosophy**

How do you deliver value to clients? (process, beliefs, approach)

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### 1–3 Year Vision

*What does success look like in measurable terms?*

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### KPI & Goal Tracking

*What 2–4 metrics actually drive your business?*

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### INSIGHTS FROM MY PARTNER / BIGGEST CHALLENGE TO MY THINKING

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*Executive Outcome: Clear understanding of each practice's current state and ambition.*

DAY 1

# Identifying Pinch Points

10:40–11:40 AM

*“What is getting in the way of you being your best self as a business owner, financial advisor, partner, and employer?”*

As the group shares, capture the pinch points that resonate most with your own experience:

<b>Capacity Constraints</b> <hr/> <hr/>	<b>Staffing Challenges</b> <hr/> <hr/>
<b>Revenue Bottlenecks</b> <hr/> <hr/>	<b>Technology Inefficiencies</b> <hr/> <hr/>
<b>Marketing &amp; Pipeline Gaps</b> <hr/> <hr/>	<b>Succession Uncertainty</b> <hr/> <hr/>

## My Top 3 Pinch Points (ranked by impact)

#1 PINCH POINT

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#2 PINCH POINT

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**#3 PINCH POINT**

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*Executive Outcome: Prioritized list of structural barriers to growth.*

DAY 1

# Strategic Partnership Discussion

11:40 AM–12:15 PM

## Ways MSF Can Create Leverage

**4 Ways to Partner with MSF** — MSF offers four distinct support options for advisors at every growth stage.

**The 3 P's — New Support Materials** — Newly developed resources designed to amplify your practice capabilities.

**Policy Reviews** — High-impact reviews of your existing book of business with real-world examples.

**Repurposing Assets** — Adapt strategies as client needs evolve — annuities, cash value life insurance, and more.

**Client Preparedness** — Are your clients prepared? Updated trusts, wills, POAs, and healthcare representatives.

**Enterprise Value** — Defining indispensable partnership value and being prepared for sudden change.

## Notes from This Discussion

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## DELIVERABLE — My 3 Strategic Priorities for Day 2

STRATEGIC PRIORITY #1

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STRATEGIC PRIORITY #2

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**STRATEGIC PRIORITY #3**

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DAY 1

## Close & Preview of Day 2

12:15–12:30 PM

### ● ACTIVITY

## Activity: Rapid Fire Close

*Day 1 Close | ~5 minutes*

Advisors shout out insights, ideas, or moments from today that stood out. Capture what resonates with you below:

### IDEAS & INSIGHTS THAT STUCK WITH ME FROM DAY 1

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## Day 2 Preview — What's Coming Tomorrow

- Business Development Growth Tools
- Succession & Continuity Planning
- Revenue Expansion
- Vendor and Resource Optimization
- 90-Day Strategic Action Plan

## Evening Notes

### CONVERSATIONS, CONNECTIONS, IDEAS FROM TONIGHT

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# DAY 2

## CULTIVATE

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*Equip advisors with implementation tools to increase revenue, efficiency, and enterprise value.*

DAY 2

# Recap & Priority Confirmation

8:30–8:45 AM

Review your 3 Strategic Priorities from Day 1 and confirm they still reflect your biggest growth opportunities.

**STRATEGIC PRIORITY #1 (CONFIRMED OR REVISED)**

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**STRATEGIC PRIORITY #2 (CONFIRMED OR REVISED)**

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**STRATEGIC PRIORITY #3 (CONFIRMED OR REVISED)**

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DAY 2  
**Business Growth Tools**  
8:45–9:45 AM

**NNA Program**

**Net New Assets & Recruiting**

Scalable growth through recruiting support and new asset acquisition strategies.

HOW NNA PROGRAM APPLIES TO MY PRACTICE

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**Business Builder Tool (Osaic)**

**Operational Benchmarking & Gap Analysis**

Identify operational improvements and growth levers benchmarked against top practices.

HOW BUSINESS BUILDER TOOL APPLIES TO MY PRACTICE

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**Prepared Buyer/Seller Programs**

**Enterprise Value & Optionality**

Structured programs to maximize practice valuation and create exit or growth options.

HOW PREPARED BUYER/SELLER PROGRAMS APPLIES TO MY PRACTICE

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KEY TOOL(S) I WANT TO EXPLORE FURTHER

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*Executive Outcome: Tool alignment based on advisor growth stage.*

DAY 2

# Succession & Continuity Strategy

9:45–10:30 AM

## Succession vs. Continuity

	SUCCESSION PLAN	CONTINUITY PLANNING
<b>Trigger</b>	Planned & implemented over time	Typically death or disability
<b>Client Notice</b>	Advance communication; buyer builds client relationship	Little-to-no notice of change
<b>Valuation</b>	Higher — buyer must see clear value	Lower — reactive scenario
<b>Key Risk</b>	Finding the right buyer	Key-man insurance & agreements

## Enterprise Value Drivers

- Advisory fees, mutual fund trails, annuity trails
- Internal employee value
- Key-man insurance
- Continuity agreements
- Refrain from 100% up-front commission
- Shift to recurring revenue streams

## My Practice Valuation Notes

### CURRENT STRENGTHS & GAPS IN MY SUCCESSION READINESS

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## KPIs I currently track for business health

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*Executive Outcome: Practice valuation readiness and enterprise value planning.*

DAY 2  
**Revenue Expansion & Capacity Building**  
10:40–11:30 AM

**High-Impact Revenue Ideas**

**Using highly appreciated annuities to fund LTC**

Clients holding appreciated annuities may have an efficient path to LTC coverage.

**Re-purposing cash value in life insurance**

Explore uses for accumulated cash value as client needs and goals evolve.

**Monetizing advanced planning**

Turn complex financial planning needs into deeper engagement and revenue.

**Bridging to other professionals**

Build referral relationships with CPAs, Attorneys, and Trust Officers for new business.

**AI & automation investment**

Strategic reinvestment into staffing, AI tools, and automation to scale capacity.

**Revenue Ideas I Can Implement**

SPECIFIC IDEAS RELEVANT TO MY PRACTICE

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**Capacity Investments I'm Considering**

STAFFING, TOOLS, OR PROCESSES TO INVEST IN

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DAY 2

# Vendor & Resource Optimization

11:30 AM–12:00 PM

*“Growth isn’t just about adding more — it’s about optimizing what you already have. The most efficient practices aren’t using more vendors; they’re using the right ones, in the right way.”*

## Vendor Tier Framework

<b>Core</b>	Non-negotiable. Directly tied to revenue, client experience, or efficiency.	My core vendors:
<b>Enhancement</b>	Value-add. Useful but not critical to daily operations.	Enhancement vendors:
<b>Replaceable</b>	Low impact. Could be cut or consolidated without major disruption.	Candidates for review:

## Technology Integration — Reflection Questions

*Where am I manually re-entering information?*

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*What processes could be automated today?*

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*Am I fully utilizing my current tools?*

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### ● ACTIVITY

## Activity: Start - Stop - Optimize

*Vendor & Resource Optimization | 5 minutes*

Quickly write one answer in each box below:

**START**  
One resource or tool to add

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**STOP**  
One thing not adding value

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**OPTIMIZE**  
One underutilized tool

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DAY 2  
**90-Day Strategic Action Plan**  
12:00–12:30 PM

You're leaving today with a personalized, accountable growth roadmap. Complete each section below — be specific, realistic, and committed.

**3 Growth Priorities**

**Growth Priority #1**

What

\_\_\_\_\_  
\_\_\_\_\_

By When

\_\_\_\_\_  
\_\_\_\_\_

How I'll Measure Success

\_\_\_\_\_  
\_\_\_\_\_

**Growth Priority #2**

What

\_\_\_\_\_  
\_\_\_\_\_

By When

\_\_\_\_\_  
\_\_\_\_\_

How I'll Measure Success

\_\_\_\_\_  
\_\_\_\_\_

**Growth Priority #3**

What

\_\_\_\_\_  
\_\_\_\_\_

By When

\_\_\_\_\_  
\_\_\_\_\_

How I'll Measure Success

\_\_\_\_\_  
\_\_\_\_\_

**1 Operational Efficiency Initiative**

*What one process, tool, or hire will most improve your operational efficiency?*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**1 Revenue Expansion Strategy**

*What specific revenue opportunity will you pursue first?*

Three horizontal lines for writing.

**1 Succession Action Step**

*What is the next concrete step you will take toward your succession/continuity plan?*

Three horizontal lines for writing.

**90-Day Execution Timeline**

Days 1–30	Days 31–60	Days 61–90
Three horizontal lines for writing.	Three horizontal lines for writing.	Three horizontal lines for writing.

# General Notes

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A series of 14 horizontal, light blue rounded rectangular boxes stacked vertically, each containing a single horizontal line for writing notes.



MarketShare Financial

# Thank You.

*Community · Collaboration · Cultivate*

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