



# Break Through Advisers

## Menu of Services

**Revenue Expansion** – A comprehensive study (Opportunity Assessment) of client portfolio, business valuation, client service model implementation, case analysis and marketing are all part of this service. The service may include hands on administrative support, coaching , and client meeting support. In addition, we provide access to our strategic partners.

**Opportunity Assessment** - This analysis includes a list of all clients, their current assets, and a recommendation on specific opportunities. These opportunities could include insurance, LTC, estate planning strategies, Real Estate and other specialized solutions.

**Adviser Recruiting:** We will work on your behalf to locate an adviser based on your needs. This could include a junior adviser to work in your office or a highly successful adviser to partner with.

**Client Service Model:** In an effort to improve the effectiveness of client service, we would create a 5 point proactive system. This system would increase the potential number of client touch points but would lead to a decrease in the hours spent on basic service.

**Business Valuation:** The valuation would be based on the EBITDA of the firm and top line revenue. The valuation is helpful in that it provides an understanding of the value of your firm today and provides a benchmark to work from. In addition, recommendations on ways to improve the value of the firm would be made.

**Case Analysis:** Our team would work with you on client case reviews to provide insight and recommendations. These reviews are typically conducted weekly and it is your decision as to which recommendations you implement. We are confident that our expertise would help discover substantial opportunities.

**Marketing:** Support your efforts in growing both your client base and improving your client wallet share. Our team can establish prospect seminars, client appreciation events, marketing support (website design, brochures, etc), and would implement a proven referral program. Some aspects of this service are outsourced to other vendors.

**Executive Coaching:** Objective is to engage your strengths in order to breakthrough your current level. Our coaching program focuses in four (4) key areas. Those areas are Creating Effective Work Teams, Themed Client Experience, Achieving Rejuvenation and Benchmarking. As a entrepreneur, you shouldn't be a slave to your business but rather the visionary and leader that allows the business to grow beyond you.

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**Contact us today for more information**

**TEL 586 202-6969**

[www.BTAdvisers.com](http://www.BTAdvisers.com)