



Front-Stage Solutions

More than ever, investors are demanding dedicated, attentive services from their wealth managers. Get the tools and resources you need to elevate your service model and compete in a saturated marketplace. Cue's Front-Stage Solutions are based on knowledge and strategies that we've spent years acquiring and refining. Grow your business—your way, while leveraging Cue and bringing the focus back to your client relationships.

PROFESSIONAL AND BUSINESS DEVELOPMENT STRATEGIES

- Shape and refine your ideal strategic approach:
 - Who is your target market?
 - Who are your competitors and what do they offer?
 - What does your current prospect and client base look like?
 - Where should your focus be?
- Analyze and assess your current methods and service models
- Survey your clients for actionable data
- Create a clear plan, pinpoint the right players and define their roles

GREAT SERVICE PROCESS (TRAINING AND ONGOING SUPPORT)

- Leverage Cue's streamlined approach and process to implement a new client
 - Clear procedures for setting up a new client's account(s)
 - New client welcome packet & checklists for a seamless transition

- Communication and educational tools and templates to help new clients understand your services and the structure of their accounts

GREAT CLIENT PROCESS (TRAINING AND ONGOING SUPPORT)

- Gain a step by step process and tools to help turn prospects into life-long clients:
 - How do you conduct a meeting?
 - What is the process that you follow?
 - What are the deliverables?
 - What do you do at each step of the process?
- Learn how to establish rapport in the first meeting
- Discover and develop a personal understanding of your client's story
- Find out how to demonstrate your firm's unique traits and values

TRAINING AND SUPPORT FOR YOUR ADVISORS

- Hands-on coaching to help you build your practice
- Guidance on creating your growth strategy
- Access to educational training sessions
- Regular communication with your relationship team
- Participation in bi-annual SKILL Summits
- Technology and resource training



VISUAL INTERACTIVE PLANNING™

- A web-based, interactive planning tool
- Collaboratively explore your client's life scenarios
- Answer common planning questions in a visual and easily accessible way
- VIP™ software training
- Learn to conduct effective client meetings using this powerful tool

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