

pentameter[®]

five measures of business success

As the CEO of an independent business, you must be equipped to make objective, strategic decisions about the key elements of your business. Pentameter[®] helps you assess the progress of your practice, build a business plan to reach your goals, and implement tools and strategies to make your business more profitable.

Pentameter brings together everything we have learned about helping financial advisors grow their business—the five Measures of Business Success:

- Business Development
- Operational Efficiency
- Human Capital
- Business Management
- Succession Planning

By providing in-depth online resources and business support from our in-house consultants focused on each of the five Measures, Pentameter helps you:

- Strengthen your practice management skills
- Build a business plan
- Set, track, and accomplish your business goals
- Grow your business
- Ultimately create a practice that is highly valuable to both you and your successor



- ★ Marketing
- 📈 Wealth Management
- 👤 Client Acquisition
- 📌 Business Acquisition



- ⚙️ Business Processing
- 💻 Technology
- 🧩 Client Services



- 👥 Organizational Design
- 🎯 Performance Management
- 📅 Onboarding & Hiring
- 👤 Employment Basics



- 📊 Strategic Planning
- 👤 Financial Management



- 🔒 Continuity Planning
- 🔄 Succession Planning
- 🤝 Advisor M&A

YOUR BUSINESS ASSESSMENT

After filling out an assessment in the portal, you will receive a score for each of the Measures, along with a printable summary that identifies areas for improvement.



YOUR BUSINESS PLAN

Having a written plan gives you a road map for growth that is more likely to succeed. You can use the portal's business plan template to identify an overall vision for your business, determine goals, track progress, and monitor results. It's a living document that can be continually updated as goals are met and new ones are set.



YOUR BUSINESS CONSULTANTS

Pentameter is more than a technology tool. It is also a process for achieving business goals. With the assistance of a designated business consultant, you can use the portal's resources to:

- Identify specific opportunities for growth based on the assessment and your own desires for your business
- Set attainable goals
- Build an action plan to meet those goals
- Execute and implement the action plan
- Track progress and monitor results

In-house business consultants provide continuous expert advice on how to implement your business plan, achieve your goals, and grow your practice.

OTHER PENTAMETER FEATURES



Business plan template to create a vision, mission, goals and action plan for the business



Knowledge library with detailed information and templates covering key topics from performing a business valuation to sample job descriptions for hiring associates



Training & educational events