

Practice Management Coaching

Run—and grow—your business, your way

Increase your capacity and drive practice growth supported by a knowledgeable partner. Our experienced Business Consulting Group can help you identify opportunities to enhance your services and deepen relationships, build efficiency, and cement your legacy.

Through a consultative process using proprietary business analysis tools, the team will examine five factors of business success: business development, operational efficiency, human capital, business management, and succession planning. They'll create a benchmark for your practice and help you build a custom plan for the areas you want to adjust. The team also serves as your personal accountability partner as you work through your plan to drive profitability.

Work with the Business Consulting Group for guidance on:

- **Growth initiatives:** Segmenting your book, expanding services, and hiring new staff
- **Operations and technology:** Assessing current workflows, enhancing productivity, and systematizing client service
- **Talent management:** Evaluating conditions for hiring, implementing hiring and training best practices, and addressing performance management concerns
- **Mergers, acquisitions, and succession planning:** Finding the right buyer or seller, structuring a deal, protecting your legacy and clients, and creating business continuity and succession plans
- **Financial optimization:** Benchmarking financial performance, planning to reduce expenses and optimize budget, managing financial metrics, and forecasting growth

For more information on how Cetera's Business Consulting Group can help you drive meaningful and sustainable results, contact **800.336.8842** or your dedicated Business Development team member, or visit **cetera.com**.

"Cetera Financial Group" refers to the network of independent retail firms encompassing, among others, Cetera Advisors LLC, Cetera Advisor Networks LLC, Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors), Cetera Financial Specialists LLC, and First Allied Securities, Inc. All firms are members FINRA / SIPC.

Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services, Investment Adviser Representatives who offer only investment advisory services, or both Registered Representatives and Investment Adviser Representatives who can offer both types of services.

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