Practice Management Resources for

# Advisors

Your financial advisory practice (like all practices) has holes in it, in the same sense that your clients' financial plans and investment portfolios have shortcomings before they hire you. But just as you work with your clients to fill the gaps in their financial lives, we work with advisory firms to fill the gaps in their practices. 4Thought provides a series of plug-and-play practice management resources to the advisor community to ensure you have access to the specific services that will seal the leaks in your dam and make your business bulletproof. Through the use of our Separately Managed Account program you can draw on these services on an as-needed basis to make your practice bigger, faster, more efficient, more enjoyable, and more profitable. We want to help you spend less time doing the things you don't want to do, and more time doing the things you like. Through 4Thought you can:

## OUTSOURCE YOUR INVESTMENT PORTFOLIO MANAGEMENT

You've probably already heard about the benefits of making a practice more efficient by focusing on asset gathering versus asset management, and about making a practice more valuable by transitioning from transactional to fee advisory services. With these starting points, we've built a program with the practical day-to-day needs of advisors and their firms in mind, with the ultimate goal of making the advisor happier.

4Thought Financial Group claims compliance with the **Global Investment Performance Standards (GIPS®)***. But while a transparent, razor sharp focus on portfolio performance is always important, providing adaptable resources and services to the advisor and his/her firm are paramount

- **Multiple investment methods in one shop**: to create all-weather portfolios prepared for ***Bull, Bear, Wolf, and Eagle markets***
- **Separately Managed Accounts**: with a unique ***"Think Outside the Style Box"*** mindset for institutions, or a hands-on advisor/firm
- **Turnkey total portfolio management**: for those that want simplicity for their business and their clients
- **Flexible modular design**: including wrap pricing, low investment minimums, custom portfolios, and consolidated web-based reporting

## OUTSOURCE YOUR CLIENT RELATIONSHIP MANAGEMENT

As your practice and your number of clients has grown, you've probably found that it becomes harder to properly service your entire book without hiring help. You may also receive referrals to new clients that you can't take on due to a lack of time or because they don't fit your client profile. But why throw money away? Rather than having to hire and train new personnel or turn away clients, consider that 4Thought has a proactive team of client relationship managers and advisors that you can tap into for everything from new client presentations and fee planning to ongoing advisory, quarterly reviews, and client servicing … while still being compensated … indefinitely.

You can choose your arrangement:

- Make an introduction and leave the presentations and advisory to us
- Bring in a proactive team to service your existing clients
- Outsource specific aspects on a client-by-client basis
- Outsource an entire segment of your client book

## IMPLEMENT A SUCCESSION PLAN FOR YOUR PRACTICE

Whether you're just looking to spend a little more time on the golf course, you're concerned about the fate of the practice you've worked so hard to build, or you want to sell your business now, we recognize the need for you to plan for succession and a potential exit strategy. Given the Boomer-driven demographic transition that is happening in the advisor community (just like with your clients), we've developed a ready-made transition program and a specially-trained team to help you extract the monetary value of your practice in the events of:

- **Semi-Retirement**
- **Full Retirement**
- **Disability**
- **Death**

## ACCESS FINANCIAL PLANNING TECHNICAL RESOURCES AND PRACTICE CONSULTING

We maintain a stable of specialists in various areas of financial planning and wealth management so that you can tap into our resources on demand, to simply pick the brain of a professional, attend our remote-access training sessions, or use our fee planning department to generate documents and recommendations for delivery to your client. You'll also be able to access our network of experts in practice consulting to help you optimize your business for marketing, technology, operational efficiency, and work/life balance.

### OUR FOUR AREAS OF FINANCIAL PLANNING FOCUS ARE:

- Investment Planning
- Business Succession
- Estate Planning
- Fringe Benefits

4THOUGHT FINANCIAL GROUP

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