



THRIVOS
CONSULTING

TRANSFORMING
PRACTICE MANAGEMENT



WHO WE ARE



THRIVOS
CONSULTING

OUR MISSION & BELIEFS

To help firms manage change in a way that leads to efficient and sustainable growth.

Our work is focused on where the industry is going, not just where it's been.

We believe that practice management is 15% concept and 85% behavioral change. Our approach is one of structured flexibility. There isn't a system, process or checklist that can transform your business if you are not prepared to also change your behaviors and belief systems.





IS YOUR BUSINESS **BOTH** INDESTRUCTIBLE & IRREPLACEABLE?

We believe that there has never been a better time than now for advisors to reflect on this question. Our commitment is to create a custom experience for each client, no matter how big or small, that supports them in the exploration of their answer.

We focus on implementing core practice management principles while bringing a fresh perspective on the financial services industry.

EXCELLENCE IS A JOURNEY, NOT A DESTINATION



Even the most successful advisory teams often times need support in **identifying, prioritizing and implementing** practice management best practices.

THE THRIVOS DIFFERENCE

After 20+ years collectively of working with financial advisors, we have created a series of engagements and programs that combine future-focused practice management consulting with behavioral coaching.

COACHING

+

CONSULTING

THRIVOS EXPERTISE

Planning &
Strategy

Client
Acquisition

Human
Capital

Client
Experience

Leadership
& Sales

OUR IDEAL CLIENT



Advisors who are building or managing financial services businesses and feel they have “plateau-ed



Advisors who are looking for support in optimizing their human capital, allowing them to gain a greater scale and capacity within their organization



Advisors who would like to have an objective outside perspective and wise counsel



Advisors who are looking for support in making critical strategic decisions about the next phase in the business’ life cycle

OUR CAPABILITIES

Our commitment is to create a custom experience for each client, no matter how big or small.

	Individual Advisory Team	Groups of Advisors	Institutions
Our Offerings	Practice Management Consulting Leadership Coaching Team Communication Coaching Team Synergy Coaching		Thrivos' Presentations and Facilitated Programs Customized engagements ranging from custom content design to train-the-trainer programs
Commitment	Minimum of 6 months	Minimum of 12 months	Client Specific

Areas of focus:

Planning & Strategy

Client Acquisition

Human Capital

Client Experience

Leadership & Sales



OUR OFFERINGS



THRIVOS
CONSULTING

PRACTICE MANAGEMENT COACHING

Follow a structured process over the course of a year for identifying and solving business challenges. We'll help you choose the service level that is right for you.

STANDARD PACKAGE

inclusions

Deep discovery & identifying of business gaps and priorities

2 calls a month with consultant for 12 months

Directive to-dos and action items between sessions

Focused on specific practice management objectives

CONCIERGE PACKAGE

In addition to everything in the standard package you'll also receive

Up to an additional hour a month with key team members

Annual DISC communication session with team

Annual Vision exercise with team

Optional Interviewing of new team members; up to 4 per year

Minimum 12 month commitment
Standard Package \$12,000, Concierge Package \$18,000

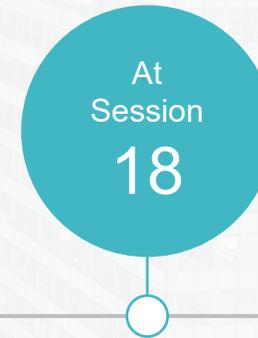
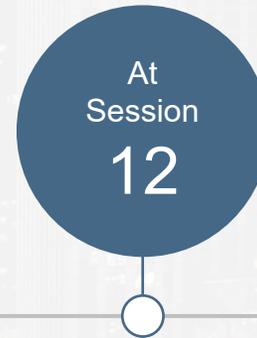
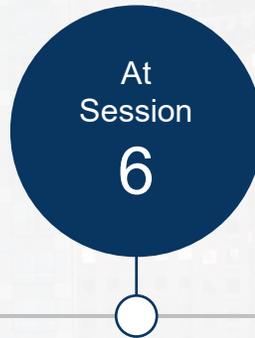
PRACTICE MANAGEMENT COACHING

Structured Flexibility

12 Month Support Plan

INITIAL CONSULTATION

Onboarding Assessment
Deep Discovery Session
Consulting Objectives
Agreement
Strategy & Implementation



Quarterly Check-Ins to focus on
Strategy & Implementation

LEADERSHIP COACHING

Not all teams need practice management consulting. Some advisors know the best practices they need to implement, understand what's changing in the industry... but still struggle to change.

Our coaching engagements can help founders and key team members:

-  Discover or rediscover their **“why”**
-  Get **“unstuck”**
-  Evolve as a thinker and leader, and experience personal growth
-  Redefine fulfillment

\$3600 for 12 sessions, \$5000 for 18 sessions

Minimum 6 month commitment

THRIVOS TEAM COACHING ENGAGEMENTS



PRACTICE TO ENTERPRISE WORKSHOP SERIES

Our flagship consulting program, Practice to Enterprise is a virtual practice management workshop series for financial advisors who are building and leading wealth management businesses.

PRACTICE *to* **ENTERPRISE**
Workshop Series



TEAM COMMUNICATION COACHING PROGRAM

Understanding each team member's unique communication style is key to building a healthy team culture.

This is a fun and informative session that will help boost morale and build camaraderie.



TEAM SYNERGY COACHING PROGRAM

Let's face it. Even teams that assess the communication and personality profiles of every team member... still sometimes struggle to get along.

This intensive program requires each team member to commit to total truthfulness and change.

PRACTICE TO ENTERPRISE

OUR FLAGSHIP PROGRAM

PRACTICE *to* **ENTERPRISE**
— *Workshop Series* —

Practice to Enterprise is a virtual practice management workshop series for financial advisors who are building and leading wealth management businesses and want to:

- Learn best practices from like-minded leaders
- Identify and prioritize their next powerful decisions
- Receive objective insight, feedback and guidance from practice management professional
- Participate in small group coaching

\$399 per month & \$499 per month



TEAM COMMUNICATION COACHING

PURPOSE

Personnel challenges within a team can often be linked to poor communication. Understanding each team member's unique communication style is key to building a healthy and synergistic team culture.

DETAILS

During this engagement we will conduct DISC assessment of all of your team members and analyze their styles in both their natural and stressed state. We will then conduct a 2-hour session with the entire team and:

- **Educate** the team on each member's unique style and needs
- Identify the **communication challenges** that exist currently in your firm
- Provide an **action plan** for how to powerfully and sustainably solve these challenges.

OUR TAKE

This is a fun and informative session that will help boost morale and build camaraderie.

\$999 per session



TEAM SYNERGY COACHING

PURPOSE

Let's face it. Even teams that assess the communication and personality profiles of every team member... still sometimes struggle to get along.

DETAILS

In this engagement we conduct a comprehensive and anonymous survey of the team and get to the root of deep issues that may be impacting team morale and cohesion.

We provided a detailed report and 4-hour debrief in order to highlight:

- The levels of synergy, empathy, trust and self-awareness that we found among the team.
- The reasons why the team is lacking in certain areas
- The ways in which the team can drive synergy and cohesion moving forward.

OUR TAKE

Not for the faint of heart, this engagement requires each team member to commit to total truthfulness and change. When the Rules of Engagement are followed, Team Synergy Coaching is highly effective.

\$5000 per engagement

SHOULD YOU WISH TO PROCEED

1

Decide which option is best for you

2

Sign Consulting agreement

3

Complete the pre-work pack prior to first meeting

4

Book meetings, one quarter in advance



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