



Value Added Institute

Advisor CFO's	HNW Client Acquisition			HNW Client Retention			VAI SERVICES
Essential Drivers	HNW Positioning	HNW Prospecting	HNW Referral	Ultimate Client Experience	HNW Knowledge	Continuous Compelling Advantage	Knowledge Building Seminars
Essential Business Systems	Target Identification	Locating the HNW	Referral Worthiness	The Three Key Elements Of UCE's	Creating a HNW/UCE Experience	Fundamentals of Differentiation	Business Development Modules
	<p style="text-align: center;">↓</p> Business Alignment	<p style="text-align: center;">↓</p> Contacting the HNW	<p style="text-align: center;">↓</p> Creating Referral Filters	<p style="text-align: center;">↓</p> Managing Client Perceptions	<p style="text-align: center;">↓</p> FA/CA Strategies for HNW Loyalty	<p style="text-align: center;">↓</p> Sustaining Compelling Advantages	
	<p style="text-align: center;">↓</p> Branding Your Business	<p style="text-align: center;">↓</p> HNW Selling Skills	<p style="text-align: center;">↓</p> Managing Referrals	<p style="text-align: center;">↓</p> Building Strategic UCE Systems	<p style="text-align: center;">↓</p> The Art of HNW Relationships	<p style="text-align: center;">↓</p> Congruency: Acquisition that Creates Loyalty	