

**SUMMARY OF SERVICES
INDIVIDUALIZED COACHING RELATIONSHIPS**

After nearly two decades of studying, observing, working with and counseling advisors Hannah knows what it takes to build an exceptionally profitable and effective advisory business. These experiences and insights are the basis for her one-on-one work with financial professionals, which draws on the techniques and tools used by the nation's most consistently successful advisors. Particular emphasis is placed on helping practitioners incorporate the skills and processes that drive new business into their daily routine.

Areas of Focus

- Finding and keeping wealthier clients
- Client profiling techniques
- Cultivating professional referral sources
- Systematizing business development processes
- Business model migration
- Building a wealth management network

Format

Hannah provides customized, one-on-one coaching on a retainer-basis exclusively, for a minimum of three months. Each relationship begins with a thorough business assessment and is subsequently tailored to the background, goals, capabilities and preferences of the advisory client.

Pricing

Monthly retainer fees start at US\$10,000 and may vary based on the size and structure of the advisory client's business. Travel to client sites outside the New York metropolitan area requires first-class travel and accommodations. More information is available upon request.

*Get turnkey access to Hannah's coaching principles and methodologies every month with a subscription to **Cultivating the Affluent** for US\$245 a year. More information is available at www.hsgrove.com/cta.html.*