The Ensemble Practice Announces the Graduation of its First G2 Leadership Class

Seattle, WA – November 27, 2017 – The Ensemble Practice LLC is proud to announce the graduation of its first G2 Leadership Class. Fifty-two professionals from 33 leading firms across the country completed the G2 Leadership Institute program. The two-year program is designed to put teams of future leaders through realistic simulations that prepare them to manage and lead advisory firms through difficult decisions. The participants represented firms serving over 133,000 clients, with combined assets under management (AUM) of $78 billion[i]. Sponsored by Fidelity Clearing and Custody Solutions®, the G2 program continues to attract future leaders, with the second class scheduled to graduate in 2018.

The G2 Leadership Institute was created to meet the financial advisory industry's growing demand for future leaders. While advisory firms are skilled in developing the client services skills of their professionals, they struggle to find opportunities and methodology to teach professionals how to manage others, how to contribute to business development and how to be better leaders. As the industry continues to grow the need to develop professionals who can manage teams and departments, develop new markets and services and someday soon ascend to be the future CEOs, COOs and key executives only becomes more acute and urgent.

"What's missing in leadership training is the experience-building component," said David Canter, head of the registered investment advisor segment for Fidelity Clearing & Custody Solutions. "Going beyond theory, the G2 Leadership Institute empowers participants to work through real-world challenges of running a business – like bringing on new partners, managing employees or acquiring another firm."

The inaugural class of the G2 Leadership Institute kicked off in January 2016 and completed two years of rigorous study of leadership best practices, which they put in practice in customized real world scenarios. Each participant was involved in developing three complete business plans guiding their firms into the future, prepared a board-of-directors presentation on growth and acquisitions, and attended four sessions with their peers dedicated to learning from experienced industry leaders and each other. The faculty of the G2 Institute included Tim Kochis, former CEO of Aspiriant, Susan Dickson, current COO of Private Ocean, Eric Hehman, CEO of Austin Asset Management, Sam Allred, CEO of the Upstream Academy and many guest speakers with experience in running and growing advisory firms. The full list of graduates is available at www.ensemblepractice.com .

"The future of the industry is in good hands," says Philip Palaveev, CEO of the Ensemble Practice. "Learning to lead and manage is a transformational point in the career of financial advisory professionals. The realistic simulations, the experience of the faculty and the environment of camaraderie, together with the enthusiasm and talent of the graduates is bound to produce outstanding results for the firms who sponsor them."

"This program allowed our class the unprecedented opportunity to work alongside some of the most talented G2 leaders at some of the best firms in our industry. We were presented with real-world scenarios and obstacles that advisory firms face, and were challenged to wrestle with and decide issues around growth, human capital, financing, governance and succession. This program not only expanded my thought process around how to solve problems that all of our firms face, but also widened my network of professional friends and mentors," says Heather Fortner Robinson, COO and CCO of SignatureFD in Atlanta, GA.

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About The Ensemble Practice LLC

The Ensemble Practice LLC is the premier business-consulting firm for the financial advisory industry. It is committed to helping independent financial advisors create multi-professional ensemble firms with strong organic growth and sustainable profitability. The firm is founded and led by Philip Palaveev, a highly regarded industry expert, thought leader and author of the books "The Ensemble Practice" and "G2: Building the Next Generation" which have guided the advisory firms in their pursuit of sustainable and successful team-based businesses. For more information visit www.ensemblepractice.com.

[i] As-of November 2017