The Ensemble Practice

Capabilities Overview

THE ENSEMBLE PRACTICE


WELCOME TO THE ENSEMBLE PRACTICE
WE HELP BUILD BETTER FIRMS.

Our Capabilities:

CONSULTING

RESEARCH

TRAINING

CONSULTING

We provide consulting programs in key practice management areas that address the complexity of building multidimensional firms, from organizational structure and technology to succession planning and competitive positioning.

An advisory business is a living organization that changes constantly, from its inception through growth, maturity and succession. The business becomes more complex as it grows, and management responsibilities naturally increase. With its shared leadership structure, an ensemble firm leverages the full potential of its professional talent to thrive in a competitive industry.

We provide forward-thinking training and coaching to help advisory businesses build and grow ensemble firms.

THE ENSEMBLE PRACTICE

References available upon request.

CONSULTING FOCUS AREAS

OUR ENGAGEMENTS ADDRESS KEY ISSUES FACING ADVISORY PRACTICES AS THEY EVOLVE INTO ENSEMBLE FIRMS.

- **Business Consulting**: Successful business planning is a comprehensive exercise. Our individual engagements involve a high level of collaboration between our professionals and the ensemble firms that we serve. We work closely with advisory business owners and their teams to formulate a detailed strategy to grow their firms, reach their organizational goals and realize their ultimate vision of a successful practice. The key to our success is maintaining a balance between discipline and flexibility in our approach and process.

- **Enterprise Partners**: We provide our institutional partners with consulting services and specialized knowledge, working across all financial advisory channels to support the engagement and growth of the client advisory firms that our institutional partners serve. In each of our institutional partnerships, our objective is to expand the capabilities of the institution to service and attract top advisors, as well as to provide those advisors with meaningful direction in the effort to grow their businesses.

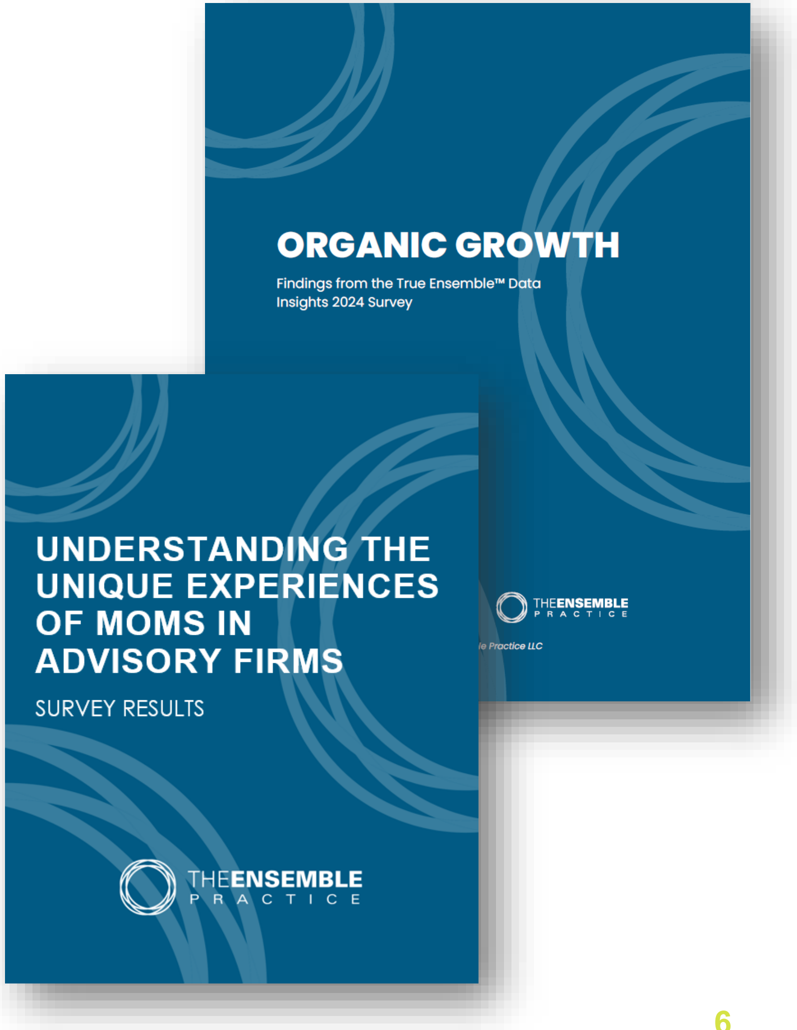
- **Crisis Management**: Sound financial management for advisory firms during a crisis is based on five key principles: Client retention is the number one priority. Anticipate and do not fall behind cash flow. Protect your vulnerable teammates. Make decisive and sufficient changes. And finally, look for opportunities during the recovery.

RESEARCH

The Ensemble team is highly regarded experts in their fields and have authored numerous industry research papers and white papers. Influential industry leaders cite our work, and we have been quoted in many industry publications.

We have led the development of practice management knowledge in the advisory industry for many years.

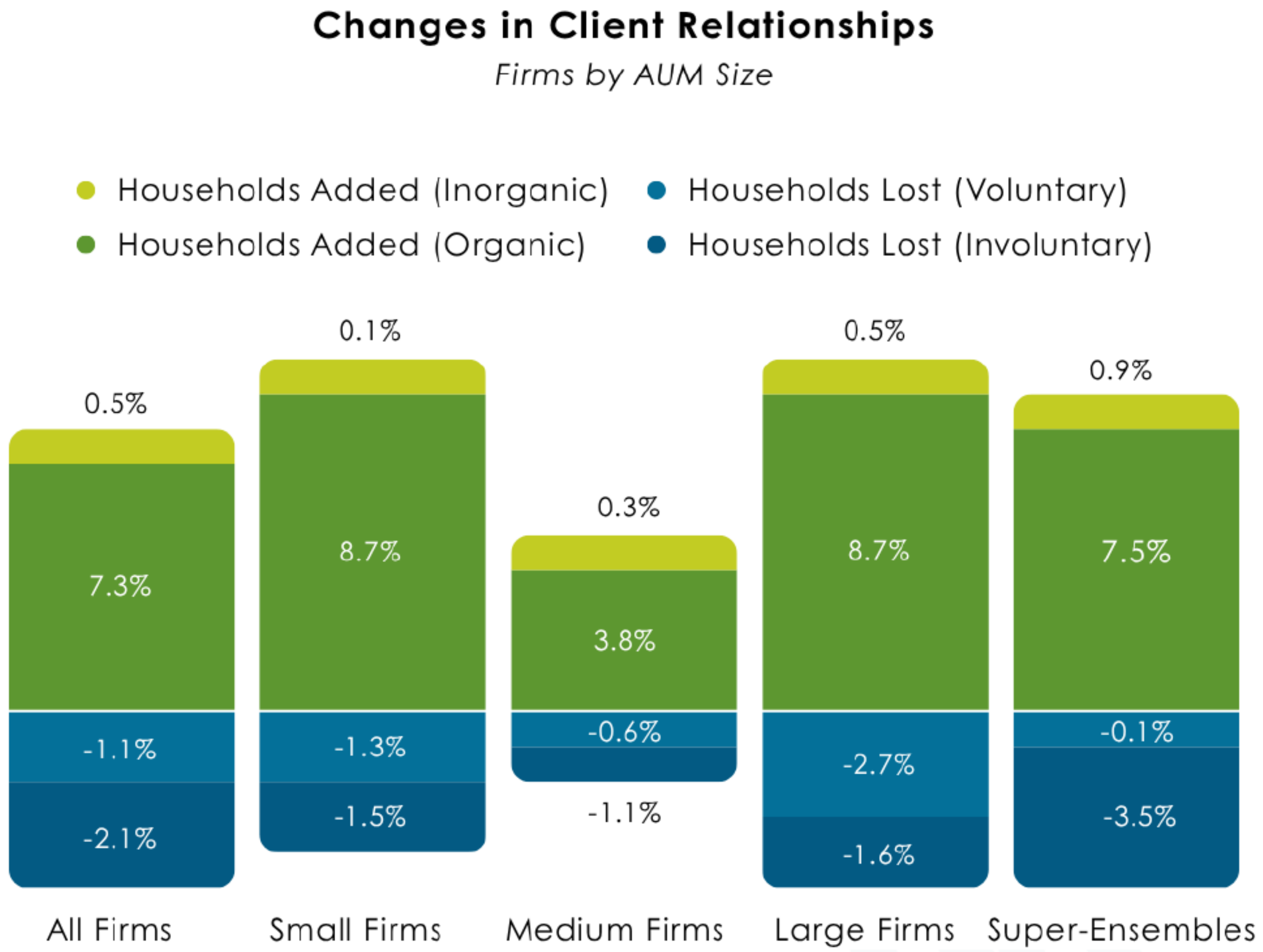
Combined, we have worked with over 1,000 advisory firms, including most of the largest wealth managers in the country.



RESEARCH: TRUE ENSEMBLE

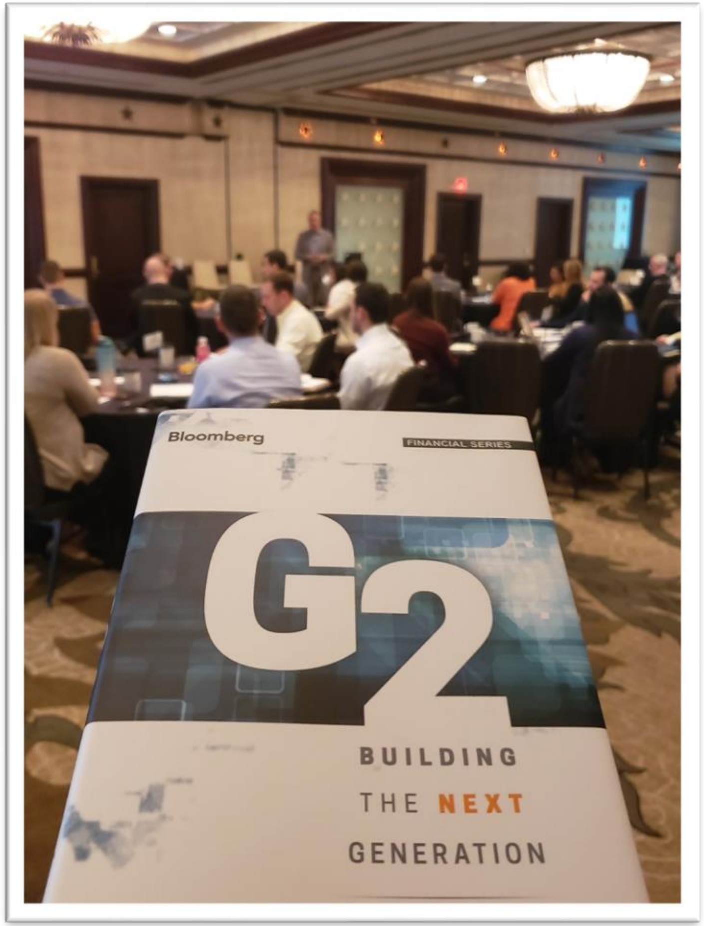
"We believe that consistent growth and profitability creates an environment where the team and their clients thrive." – Philip Palaveev, CEO, The Ensemble Practice

The hallmark of our research is our True Ensemble™ study. Now in its third year, this study was developed for participants across the financial advisory industry. The study explores growth and growth strategies in detail while also creating critical benchmarks – including deep compensation data across more than 25 positions prevalent in advisory firms.



THE ENSEMBLE PRACTICE

TRAINING: G2 LEADERSHIP INSTITUTE



The G2 Leadership Institute is the premier training program for developing the future leaders of the financial advisory industry. This two-year professional development program is designed to hone the leadership and business management skills of advisors and operations professionals who are preparing to take on leadership and ownership positions within their advisory firms.

The program is built around the concept of teamwork and business simulation. Each participant is assigned to a team of peers who together run a realistically simulated independent firm. The team manages the firm and makes decisions on the firm's future vision, strategy, growth initiatives and human capital investment.

G2 LEADERSHIP INSTITUTE

- **Comprehensive Content:** Sessions deliver management knowledge from top industry experts, including Fidelity's PM team and The Ensemble Practice.
- **Team Collaboration:** Simulation requires participants to work with their peers and build a team with a well-functioning leadership and decision-making structure.
- **Expert Coaching**: Each team is assigned a coach, and the small size of sessions allows for extensive contact with the instructors, the industry's thought leaders.
- **Evolving Connections**: The program is designed to span two years, fostering ongoing dialogue and continuity of learning with post-graduate networking and content.

I was motivated to apply for the G2 program because I hoped to harness more than 50 years of combined RIA leadership, management, and growth experience… Having now completed the program, **I wholeheartedly believe that the experience was as professionally valuable as my MBA**.

— MARK WERNIG, Regional Managing Partner, Wealth Advisor, CI Private Wealth, G2 Class of 2022

TRAINING: G2 GROWTH LAB

- **Lead Generation Focus:** We believe that most of all, G2 professionals need a systematic process to develop new opportunities (leads).
- **Practical:** We seek to develop and train strategies that are tested in the real world. We leverage the experience of 350+ G2 professionals graduating from the G2 Institute.
- **Data-driven:** We utilize survey data from hundreds of advisor firms and thousands of investors.
- **Individual Focus:** We spend half our time in one-on-one training sessions tailoring individual strategies.

Participants: Class size of 15

Format:

- ✓ Monthly 1:1 meetings
- ✓ Ten virtual group webcasts
- ✓ One in-person meeting

G2 GROWTH LAB

90% of advisory firms missed their growth target in the last two years.

Founders rate the business development skills of their next generation as D+.

IT'S TIME FOR A NEW APPROACH.

- We create and execute individual plans focused on the unique experiences and skills of every participant and their firm.
- We implement as we learn. We focus on accountability and immediately applying what we learn in practice.
- We leverage data from across the industry, investor research, and the experience of the participants.
- We learn from each other. The program creates camaraderie in learning together and sharing best practices.

OUR TEAM

MEET ENSEMBLE

MATT MCGINNESS
Senior Business Consultant

BRANDON ODELL
Partner & Director of Business Consulting

PHILIP PALAVEEV
CEO

KRISTEN WOODY
Director

QUESTIONS? PLEASE REACH OUT TO US AT:

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THANK YOU!

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