G2 GROWTH LAB

EMPOWERING NEXT-GEN LEADERS' BUSINESS DEVELOPMENT

THE ENSEMBLE PRACTICE

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.

THE PROBLEM

The industry is struggling with organic growth.

“Old school” methods are ineffective or rejected by young advisors.

The next generation (G2s) struggles to generate leads and find where to begin.

Marketing strategies are highly abstract and lack differentiation.

G2 professionals excel when they have leads to work with but struggle to generate leads on their own.

Firms underinvest in marketing, with even the largest firms spending only 2.4% of their revenue on growth yet expecting 10% to 15% growth in assets from business development.

THE KEY TO SUCCESS: 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.

Academy Participants: Class size of 15

Duration: One year, starting March 2026

Format:

- ✓ Monthly 1:1 meetings
- ✓ Ten virtual group webcasts
- ✓ One in-person meeting taking place in Seattle, WA, in September 2026

WHAT MAKES THIS PROGRAM DIFFERENT

- 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.
  - 10 years of advisor surveys and data from more than 1,000 firms
  - Three years of investor surveys with more than 1,000 participants
  - 350+ G2 professionals participating in the G2 Leadership Institute
- We learn from each other. The program creates camaraderie in learning together and sharing best practices.

A TRUSTED VOICE, A PERSONAL APPROACH

PHILIP PALAVEEV
CEO, The Ensemble Practice

The G2 Growth Lab is led by Philip Palaveev, an industry expert and highly sought-after consultant focused on creating team-based financial advisory businesses aimed for sustained growth, profitability, and value.

Each participant will have **monthly hour-long calls with Philip and the Ensemble Team** to discuss real-world challenges impacting growth from target markets to social media presence.

THE G2 GROWTH LAB COACHES

BRANDON ODELL
Partner & Director of Business Consulting, The Ensemble Practice

MATT MCGINNESS
Senior Business Consultant, The Ensemble Practice

THE GOALS WE SET

WE MEASURE SUCCESS BY

- At least doubling the leads generated by every participant.
- Increasing revenue generated by each participant by 50% or more.
- Developing confidence in the skills developed and a lasting presence in the target market.
- Creating a long-term strategy that continues to drive success.

PROGRAM OVERVIEW

INDIVIDUAL FOCUS

Throughout the program, participants will complete individual assignments and have monthly hour-long, virtual meetings with Philip Palaveev.

- Review past experiences and strengths, and weaknesses
- Select a clear target market based on the firm's strategy and individual interests
- Articulate an individual lead-generation strategy
- Monitor and review progress and make strategy adjustments
- Work on tactics and fine-tune communications
- Bring accountability and energy to the process

THE ENSEMBLE PRACTICE

UNIQUE APPROACH

EACH PARTICIPANT

- Develops and executes a growth plan during the program
- Writes and publishes one article
- Records and publishes a video
- Develops and delivers a presentation

IN EVERY SESSION WE

- Review the execution of our plan
- Identify and remove obstacles
- Monitor results
- Celebrate success

WHO YOU ARE: G2 GROWTH PARTICIPANTS

IDEAL FIRM

- Seeking to empower and train the next generation of professionals.
- Determined to grow and willing to invest in marketing at the firm and individual and firm level.
- Behaves strategically and acts as an ensemble firm.
- Open to change and willing to move past golfing and asking for referrals.
- Committed to a target market and being selective in its client acquisitions.
- Collects and utilizes data in business development

IDEAL PARTICIPANT

- Identified as a business developer with some experience in developing new relationships.
- Participates in firm-level growth initiatives and actively contributes to the firm's growth strategy.
- Practices as a lead advisor, managing a meaningful number of client relationships on their own.
- Has the interest and ability to create and deploy content to build a reputation.

CAMARADERIE IN LEARNING

WE BELIEVE IN LEARNING FROM EACH OTHER

- Identifying best practices
- Sharing ideas and stories
- Supporting each other through challenges
- Giving each other perspective
- Collecting intelligence and data across markets

MONTHLY 1:1 MEETINGS

Growth participants will schedule a meeting with Philip Palaveev to discuss and review content to the following topics:

1. **Review Data and History:** March 2026
2. **Market Research and Setting Goals:** April 2026
3. **Develop Strategy and Differentiate:** June 2026
4. **Answer and Practice the Big Questions:** July 2026
5. **Review Referral Approach**: August 2026
6. **Community Building Approach:** September 2026

6. **Personal Brand Building:** October 2026
7. **Content Creation and Strategy:** November 2026
8. **Review Leads:** December 2026
9. **Your Personal Style:** January 2027
10. **Next Steps:** February 2027

**Participants will be able to schedule individual calls during a specific week in the month identified. We will work with participants within reason to accommodate their schedules.*

PROGRAM WEBCASTS

Advice is a team sport, and so is business development. We emphasize both individual accountability and teamwork and believe in learning together and learning from each other. Our group sessions will cover:

1. FUNDAMENTALS OF BUSINESS DEVELOPMENT
2. HOW CONSUMERS CHOOSE
3. BUSINESS DEVELOPMENT STRATEGIES THAT WORK
4. UNDERSTANDING AND GENERATING REFERRALS
5. BUILDING CLIENT COMMUNITIES AND USING IMAGE ENHANCEMENT
6. WORKING WITH CENTERS OF INFLUENCE
7. CONSTRUCTING A MARKETING STRATEGY: METRICS, CHANNELS, AND APPROACH
8. SOCIAL MEDIA PRESENCE
9. CULTIVATING YOUR PUBLIC PERSONA: BUILDING YOUR AUTHENTIC VOICE
10. EFFECTIVE NETWORKING AND BUILDING CONTACTS

IN-PERSON MEETING

September 2026 | Seattle, WA

We will convene in Seattle, WA to focus on communications and best practices that will move your business development efforts forward.

We will connect with and learn from each other exchanging best practices.

We will practice, live, our communication skills lead by the experts at Decker Communications.

ADDITIONAL DETAILS & PRICING

- **A class of 15 participants is chosen after each application process.**
- **Classes start in March 2026**
- Program cost includes all materials and tools, as well as access to the G2 Leadership Institute Alumni Network.
- Participants are responsible for travel expenses associated with the one in-person meeting and are eligible for the preferred hotel rates secured by The Ensemble Practice.

PRICING

Standard Price
$20,000 per participant

Multiple Participants
There are price incentives for firms that have multiple participants in the program

APPENDIX

FAQ

Do I need to be a lead advisor to participate?

Yes, we emphasize leveraging existing client relationships and professional skills that are unique to the lead advisor position. Lead Advisors are professionals who manage client relationships independently.

Is this a good program for marketing professionals?

Some aspects of the program may be a good fit for marketing professionals, but many of the classes focus on sales skills and direct engagement with leads.

What if my firm does not support my approach or market?

We believe business development is most successful when it combines a firm-level strategy with individual accountability and execution. We strongly recommend securing the support of the firm.

What if I am a solo advisor?

Absolutely! We love working with solo professionals building their practice and can help with your participation.

Do I need to be a G2 Leadership Institute graduate to attend?

No. The G2 Growth Academy is created for any advisor who wants to focus on improving their approach to new business.

IF YOU WISH TO APPLY TO THE PROGRAM OR HAVE SPECIFIC QUESTIONS, PLEASE DON'T HESITATE TO REACH OUT TO
THE ENSEMBLE PRACTICE AT:

PHILIP@ENSEMBLEPRACTICE.COM

THANK YOU!

THEENSEMBLE PRACTICE