



THE ENSEMBLE
P R A C T I C E

ENSEMBLE EXECUTIVE FORUM

A TRUSTED ADVISOR ON CALL. THE RIGHT PEERS TO THINK IT THROUGH.



As advisory firms grow, leadership decisions become more complex. And most leaders face critical decisions with limited outside perspective.

They can't initiate a consulting engagement for every issue. And industry conferences rarely provide the opportunity to work through real decisions with your peers.

What many leaders need is a trusted advisor they can call regularly to pressure-test ideas and discuss challenges and connection to peers facing the same challenges.

The **Ensemble Executive Forum** provides ongoing, individual strategic guidance for your firm from The Ensemble Practice, combined with opportunities to collaborate with fellow firm leaders.

Participants also receive access to Ensemble-created tools and templates, as well as the team's proprietary research, including our annual True Ensemble Data Insights.

HOW IT WORKS

The Executive Forum combines ongoing consulting support with structured opportunities for peer collaboration.

MONTHLY, INDIVIDUAL FIRM CONSULTING CALLS

- Participants meet monthly with The Ensemble Practice for individual firm calls to discuss timely issues affecting their firms, recognizing that leadership challenges can evolve quickly from week to week and month to month.
- These conversations focus on the decisions leaders are actively facing in their businesses.

BI-YEARLY IN-PERSON MEETINGS

- Participants also gather twice each year for deeper strategic discussions with fellow firm leaders.
- The first meeting will take place in early 2027, followed by a second meeting in Fall 2027.

ONGOING STRATEGIC GUIDANCE

The most important decisions facing advisory firms rarely happen on a fixed schedule. Through the Executive Forum, participants receive **monthly individual consulting calls with The Ensemble Practice**, creating a consistent opportunity to cover the questions that are keeping you up at night:

- How should the firm grow?
- What does the right organizational structure look like?
- How should leadership and ownership evolve over time?
- How should we pay ourselves and structure compensation?
- Where should we invest in the business?

This structure provides leaders with **trusted advice when it matters most.**

KEY TOPICS EXPLORED

Through monthly discussions and in-person collaboration, participants work through the strategic decisions shaping advisory firms, including:

- Growth strategy and capacity planning
- Organizational structure and team design
- Staffing, compensation, and incentives
- Ownership planning and succession strategy
- Financial management and firm economics

Drawing on decades of consulting and research, The Ensemble Practice helps frame key decisions and guide leaders toward practical solutions that move their firms forward.

GUIDED BY TRUSTED VOICES

The Ensemble Executive Forum is led by **Brandon Odell** and **Matt McGinness**. The Ensemble Practice's lead consultants work directly with advisory firms on the strategic decisions that shape their businesses. Together, they bring:

- Decades of leadership and consulting experience in the financial advisory industry
- Hands-on experience advising firms on growth strategy, organizational structure, compensation, and ownership planning
- Insights drawn from Ensemble's decades of research on how advisory firms grow, scale, and sustain leadership over time
- Practical guidance shaped by real consulting engagements with advisory firms navigating growth and leadership transitions



BRANDON ODELL
Partner & Director of Business Consulting



MATT MCGINNESS
Senior Business Consultant

WHO SHOULD PARTICIPATE

The Executive Forum is designed for leaders responsible for the future of their firms. Typical participants include:

- Founders and CEOs
- Managing partners
- Firm leaders responsible for strategy and growth

The program is best suited for firms navigating the challenges of growth and organizational evolution. Participants leave with clearer priorities, practical frameworks, and a network of peers committed to building stronger firms.

EVOLUTION OF A FIRM



\$250,000
Build practice



\$500,000
Hire first employee (CSA)



\$1 Million
Hire service advisor



\$2 Million
Operations team forms



\$2 Million
Promote first new partner



\$5 Million
Investment team forms



\$5 Million
Marketing function forms



\$10 Million
Hire or promote executives



\$15 Million
Board of directors emerges

FAQ

HOW DOES THIS DIFFER FROM YOUR CONSULTING WORK?

The Ensemble Practice has worked with firms across the industry since it opened its doors 13-years ago. Our traditional consulting is episodic: you engage when a specific need arises. This is ongoing. You have regular access to our team to pressure-test ideas, navigate challenges, and make better decisions as they happen.

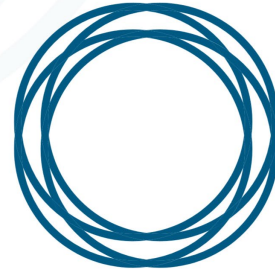
HOW MUCH DOES THIS COST?

One year in The Ensemble Executive Forum is \$30,000, billed quarterly. This includes unlimited attendance on all Zoom sessions and up to 3 people from your firm at the in-person meeting. If you'd like to bring additional team members to the in-person event, just reach out and we're happy to discuss. *Travel and hotel are not included.*

WHAT IS THE START DATE?

The program has rolling admissions, so you can join when it makes sense for you.

If you wish to join the program or have specific questions, please don't hesitate to reach out to The Ensemble Practice at matt@ensemblepractice.com.



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THANK YOU.



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