



# Give Your Practice Sound Financial Growth

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- Gain access to the resources you need to become a superior financial manager of your business
- Increase operational revenues while decreasing operational expenses
- Achieve exponential business growth

[SoundIncomeStrategies.com](https://SoundIncomeStrategies.com)



# The \$500 Million Independent Advisor Opportunity

## Grow Your Practice with Sound Income Strategies

The wealth management industry continues to evolve and mature. Investment advisory firms have recently entered a new era of prosperity with the explosion in global wealth creation, leading to the exponential growth in institutional Wall Street investment advisory firms.

Still, many independent investment advisors struggle with achieving substantial year-over-year growth and finding ways to scale their practice.

Why is this? For almost every firm that has reached the \$500M+ AUM benchmark of success, it has taken some form of business acumen and process beyond the skill of being a great wealth manager.

By taking a fresh look at where you are now, where you want to go, and most importantly, what is possible; Sound Income Strategies can help you achieve the substantial, exponential growth and success that will help enable you and your practice to bring in more than \$40 million in new client account AUM every year so you can reach and exceed the elite \$500M+ level.

## Let's Face IT: Growing Is Hard to Do

They are questions we have heard time and time again for over two decades: Why is scaling and growing your independent investment advisory practice so hard to do? Is there a faster, easier way to grow your client base and practice?

Some advisors may not want to take the risk associated to realize the rewards that come with it. Others might not want to put in the time and effort to scale or, may love being a financial advisor but may dislike the business-owner aspect of their practice. Successful advisors often operate in a different manner than most but share unique qualities that lead to success.



**The Sound Income Strategies' Elite Advisor Program** is more than a pitch, it's a success story that has achieved quantifiable results.

A typical Sound Income Strategies' Elite Advisor consistently brings in

**\$40 Million+**  
in new client account AUM each and every year



# What's Needed to Become a \$500 Million Shop?

## A Unique Value Proposition

Often, the hardest question to answer is: Does my firm have a unique value proposition to propel my firm to a higher level? The market is so fiercely competitive that it is essential to deliver a fundamentally differentiated and uniquely compelling investment solution.

A differentiated business model is critical for a firm to gain a disproportionate share of the corresponding addressable market. It sounds simple, but in practice, it is difficult.

## Attract Not Chase

The successful \$500 million shops have learned to stop chasing new business and start attracting it. Here are the five things you need to start attracting and stop chasing:

The founders of most successful firms have an eye for identifying and pursuing profitable and scalable growth opportunities. Growth for the sake of growth, without a proven and actionable plan, often leads to wasted time, money, and eventual stagnation.

### **1. Unique Value Proposition**

If you blend in with your competition you'll be relegated to a life of chasing. In order to attract and not chase, you need a unique value proposition that separates you from the competition.

### **2. Proven, Turnkey Branding & Marketing Strategies**

You can have the best value proposition out there, but without effective branding, your prospects will not know who you are, no one will walk in your door, and you'll be stuck chasing.

### **3. Lead Generation**

Lead generation is what gets people to take action, but it cannot be chasing-based. It must be attraction based.

### **4. Sales Guidance And Mentoring To Help Ensure High Levels Of Growth Success**

You need a sales and planning process that has structure, but has flexibility within the structure—so you can be a good advisor. It must have structure, because if you are reinventing the wheel with how you present things to every prospect, that is not efficient.

### **5. Back-Office, Operational, Legal, And General Staffing Support**

By having an effective practice management program in place, you can manage your time and resources more effectively, so your office can run like a well-oiled machine even when you are not there.



# PARTNERSHIP HAS ITS PRIVILEGES



Take Your  
Practice To A  
Higher Level

**The Sound Income Strategies' Elite Advisor Program is a comprehensive independent investment advisor program designed to give advisors like yourself, unsurpassed support, tools, resources, and one-on-one guidance to exponentially grow your practice and become an elite, \$500M+ independent investment advisor.**

## Next-Level Tools For Next-Level Growth

Consistently grow your book of business with \$40+ Million, year-over-year, in new client account growth. It's an achievable goal that will make it possible for you and your firm to grow quickly and reach the \$500 Million managed assets benchmark.

## Key Business Elements for Next-Level Success:

1. **A Clear and Recognizable Value Proposition:** Sound Income Strategies' unique value proposition will help enable you and your firm to attract prospects instead of chasing. All elite firms possess unique value propositions that drive their level of success. Ours is delivering consistent and reliable income our clients can count on—while helping to preserve the principal balance of their retirement savings. Our investment strategies, support, and partnership can help position your firm as a leading firm embracing the highest level of fiduciary standards by putting your client's interests above all else.
2. **Unparalleled Branding:** Our National PR Program can help elevate your name and brand in your area and beyond—with guest appearances on leading financial news networks like Fox Business, CNBC, and Bloomberg —as well as on our Founder's show, The Income Generation with David Scranton. We are also part of the inside track in the financial publishing world—which means we can help make you an Amazon Bestselling Author. Plus, our turnkey radio show program can get you on the air to help make your brand, and firm, well-known names in your area.
3. **A Diverse and Dynamic Array of Lead-Generation Tools:** Our 27 proprietary marketing systems can provide you with access to warmer and more cost-effective strategies that will help attract new business, so you won't have to chase it. We'll do all of the market research, analysis, and legwork to help you grow and expand your practice. Pre-screened, pre-qualified lead generation is available for those who qualify.
4. **A Proven Sales Process:** During his 30+ years in the industry, our Founder has created and perfected his Sales Process—which has been proven to help advisors boost their sales and closing ratios, while always doing what's in their clients' best interest. You'll receive one-on-one coaching and mentoring on how to put our turnkey sales process to work for you and your firm.
5. **Unsurpassed Operational Support:** Through one-on-one coaching for you and your staff, our Practice Management Program can help your practice run more efficiently. Instead of spending time managing operational issues, you'll be able to remain focused on the tasks that generate the most revenue for your practice.

It is our belief that these attributes are critical to scaling success to reach the next level of independent investment management.

# Take the **Next Step** In Elevating Your Practice To A Higher Level

An advisor's ability to recognize the scope and limitations of their own talents and recognize the importance of aligning with the right partner can be the key to helping take their practice to an elite level.

If you, or your firm, are missing any of these attributes, consider revisiting your long-term strategic plan to build in these elements, or align with SOUND INCOME STRATEGIES; a proven partner that can help bring these elements, and more, to expedite your firm's growth and help you become the elite asset manager you've always imagined you can be.

If you'd like to learn more about partnership opportunities with Sound Income Strategies, please call Barry C. Wheelles today at (954) 487-1850 or visit: [SoundIncomeStrategies.com](http://SoundIncomeStrategies.com)



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