This program supports:

Practice management

nuveen
A TIAA Company

The digitally engaged financial professional

Why participate in this program?

- Clients increasingly expect their interactions with their financial professionals to be enhanced by digital technologies
- A robust digital strategy can help you build deeper relationships with clients while driving profitability and scale
- Our digital audit guides you to pinpoint where small changes can translate into powerful rewards

25%

*of advisors have no virtual interaction with clients beyond email**

QUESTIONS ADDRESSED

How do I reach and engage more prospects?

Does my online presence resonate with my audience?

How can I provide high-touch client service at scale?

LEARNING OUTCOMES

Align your digital brand to your value proposition

Create and share content that gets results

Leverage versatile and cost-effective technology tools

FORMAT

20-minute live or virtual presentation

Select opportunities for one-on-one consultations with Advisor Education Specialist

I walked away with a clearer sense of my value prop and how to convey it.

Positioning myself as a thought-leader is easier than I had assumed.

We can implement these strategies without investing in additional tools.

Summary

Understand how today's technology can enhance your practice. Technology can enhance every aspect of financial advisory services, from marketing and branding to day-to-day operations. The strategic use of these tools – many of which you already have – can help you gain efficiencies so you can cost-effectively build your business.

This program takes a deeper dive into some of the concepts presented in *Building a better practice*, but that program is not a pre-requisite.

*Source: SmartAsset.com

Additional resources

FOUR-STEP DIGITAL AUDIT serves as a companion guide to the digitally engaged financial professional program

BUILDING A BETTER PRACTICE SEMINAR covers a broad array of related topics, including gaining efficiencies, aligning your service model to support client experience, and adding more value to client relationships

BUILDING A BETTER PRACTICE WORKBOOK leads you through creating a compelling value proposition, and identifying a range of opportunities to implement efficiencies and accelerate business growth

ACTIONABLE ARTICLES focus on upgrading your digital strategy, building a diverse team and more.

ADVISOR EDUCATION SPECIALISTS

James Bergeron, J.D.

Jim has more than 30 years of experience in financial services and product development. He frequently lectures and speaks at national and international conferences, where he is called on to demonstrate unique ways to put wealth management concepts into action.

AREAS OF EXPERTISE:
Wealth planning • Taxation issues • Estate planning • Family wealth planning • Practice management and business building

Robert Kron, CFP®

Rob has been in the financial services industry since 1990, focused primarily on advisor education. In addition to presenting virtually and in person to audiences of all sizes, Rob has appeared in various print and broadcast media, including CNBC, Fox Business, Bloomberg, and Advisor TV, the Wall Street Journal and USA Today.

AREAS OF EXPERTISE:
Social Security • Medicare • Retirement income planning • ESG/responsible investing • Practice management and business building

Contact your Nuveen Advisor Consultant today at 800.221.9271 for more information.

About Nuveen Advisor Education

Nuveen brings our financial professional partners — and their valued clients — an award-winning group of subject matter experts ready to share ideas, insights and educational programs. Whether it's a focus on enhancing an advisor's practice, acquiring new clients or current, actionable market and asset class insights, Nuveen offers timely and relevant content and programs.

We look forward to partnering with you.

IMCA 2022 STAR AWARDS WINNER OVERALL ADVISOR EDUCATION

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