nuveen
A TIAA Company

This program supports:

Client acquisition	Practice management

CE APPROVED
1 hour CFP, IWI and CPE for CPAs

Building a better practice:
Adapt and accelerate

Why participate in this program?

- Clients' expectations continue to evolve, putting more strain on margins and profitability
- Identifying your differentiators and drivers of client satisfaction empowers you to optimize how you spend your time
- Accelerate the growth of your practice by creating efficiencies and focusing on high-value activities that generate revenue and referrals

*Practice management professionals report that **the most prevalent productivity challenge** for advisors is **serving non-ideal clients**[1]*

LEARNING OUTCOMES	QUESTIONS ADDRESSED	FORMAT
Effectively communicate your value to clients	How can I add more value to my client relationships?	50-minute presentation, available live and on demand
Avoid five top productivity killers	How can I serve all my clients more efficiently?	One hour available CE credit for CFP and IWI, CPE credit for CPAs
Align your service model and client experience	How can I leverage technology to provide a better client experience?	Supplemental 25-minute presentation on leveraging digital technology

Summary

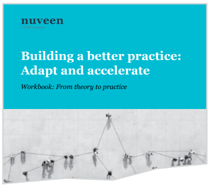
Financial professionals can accelerate the growth of their practice by delivering what clients value most. This program is designed to help advisors take simple steps to align the services they offer with clients' needs and priorities.

I gained new perspective – I'd call it a growth mindset.

I pinpointed the intersection between what I do and what my clients really want and value.

We identified activities and clients that don't merit the time we were spending on them.

Additional resources



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

DIGITALLY ENGAGED PROFESSIONAL GUIDE dives deeper into digital technology tools that can support brand-building and operational efficiencies

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

ADVISOR EDUCATION SPECIALISTS

James Bergeron, J.D.

Molly Huck, CIMA®

Robert Kron, CFP®

Christine Stokes

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.

IMEA 2022 STAR AWARDS WINNER OVERALL ADVISOR EDUCATION

1 Source: Cerulli 2022, https://www.napa-net.org/news-info/daily-news/cerulli-non-ideal-clients-undermine-productivity

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