

Building a better practice: *Adapt and accelerate*

Program summary

Client expectations are evolving and so is our industry. Financial professionals who want to accelerate the growth of their business and command their fees must adapt their practice and emphasize the value they deliver, or risk getting left behind.

Join us as we tackle critical conversations to help you thrive in today's rapidly changing environment with actionable ideas to adapt and accelerate your practice.

Suitable for financial professionals who want to:

- Accelerate the growth of their practice
- Find more time to spend with clients
- Coach or lead a team on how to adapt and grow their business

Key benefits:

- Focus your practice on value differentiators and drivers of satisfaction
- Improve your profitability
- Avoid five productivity killers
- Operate with a fiduciary mindset
- Enhance client engagement through digitization

Curriculum components



Presentation

- Available live and on demand, this financial professional presentation aligns and articulates your expertise with services that client's desire
- Effectively communicate your value
- Optimize profitability and create efficiencies
- Enhance your client experience to create long-term, loyal relationships



Workbook

- Actionable steps towards building your plan
- Determine and recognize your value differentiators and ideal market
- Identify opportunities for expansion and efficiencies
- Craft a compelling value proposition



Digital engagement guide

- Available as a brochure or short presentation
- Boost your understanding of virtual meeting best practices
- Produce creative ideas to better connect with prospective and current clients
- Leverage technology to attract your target clientele

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

This material is not intended to be a recommendation or investment advice, does not constitute a solicitation to buy, sell or hold a security or an investment strategy, and is not provided in a fiduciary capacity. The information provided does not take into account the specific objectives or circumstances of any particular investor, or suggest any specific course of action. Financial professionals should independently evaluate the risks associated with products or services and exercise independent judgment with respect to their clients. Investing involves risk; principal loss is possible. Nuveen provides investment advisory solutions through its investment specialists.

NOT FDIC INSURED | NO BANK GUARANTEE | MAY LOSE VALUE