



ValuCompass

**WANT MORE
OWNER CLIENTS?**

DISCOVER FIRST -
“THE FASTEST OWNER ENGAGEMENT TOOL ON THE PLANET”





86%

Owner's want one-stop help to plan, execute and grow both professionally and personally

MassMutual Research



10X Better Production

- More Revenue from New Owner Clients
- More Revenue from Current Owner Clients
- Deepen Relationships with Business Owners
- Enhanced Skills with Business Owners
- Play an Important Role in Improving Local Community

PROBLEM: ADVISORS/OWNERS THINK DIFFERENTLY



OWNER BRAIN



ADVISOR BRAIN



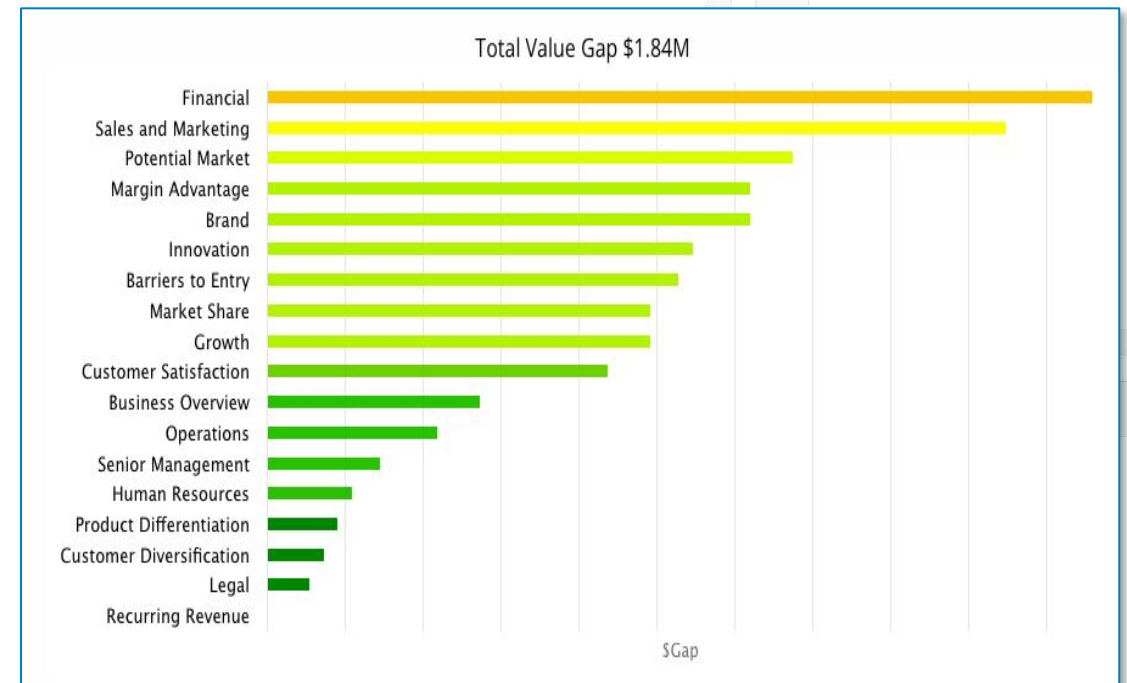
“FLAGSHIP” DISCOVER ASSESSMENT & REPORT



“FASTEST OWNER ENGAGEMENT TOOL ON THE PLANET”



- 60%+ Conversion, in 30 minutes
- 5 DISCOVER assessments uncover:
 - \$240,000 in advisory fees (1%)
 - \$5,360,000 AUM opportunity
 - \$15.6M in insurance needs
 - 401(k) take-over opportunities



ONBOARD

- Client Dashboard
- Professional Meeting Tools
- Just-in-Time Training Videos



WE GET ADVISORS IN THE GAME



LAUNCH

GOING LIVE (It's fun)

- 5D Kick Start to build momentum
- Study Group with experienced mentors
- Help Desk

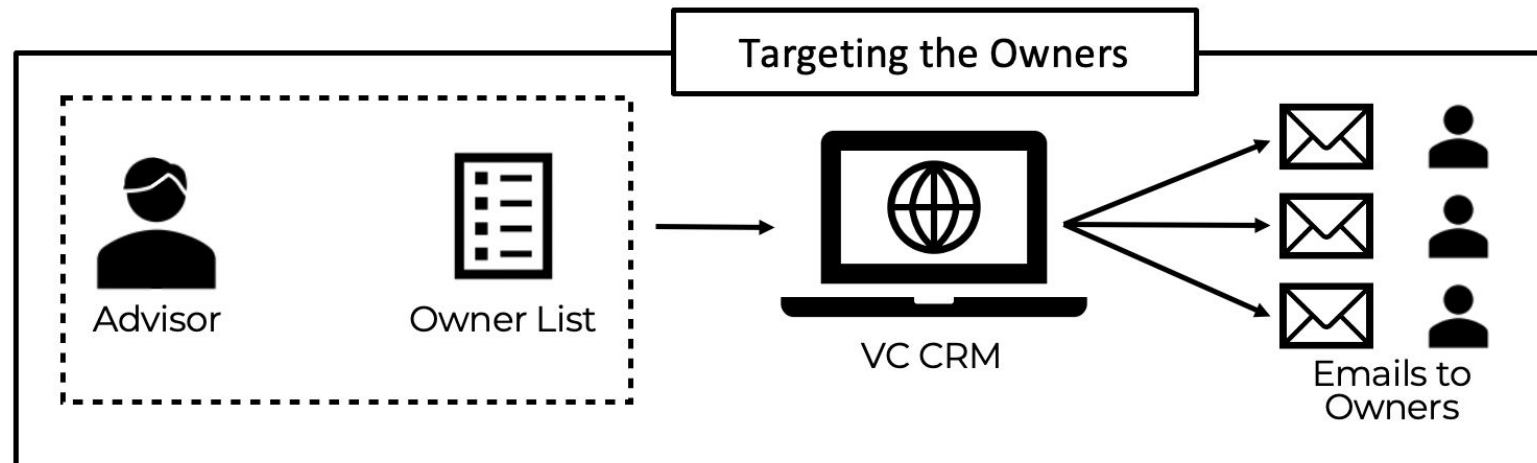




ACCELERATE

PRECISION MARKETING (It's Exciting)

- 20D Owner Campaign
- Expert Referral Network
- “Share” Automated Compliant Connectivity





**5 New Owner
Clients**



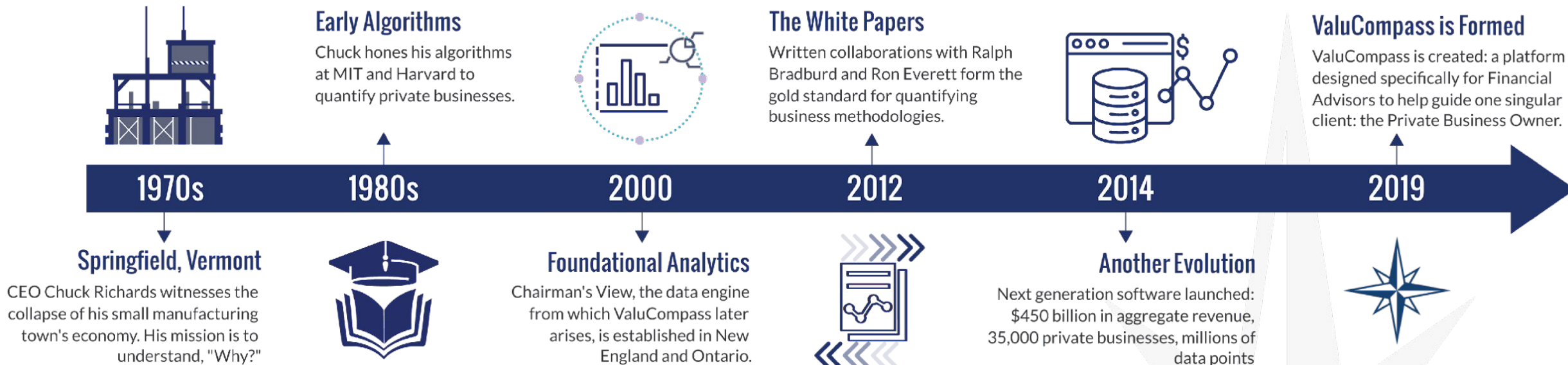
**100% ROI
Guarantee**



APPENDIX



BUILT ON CONTINUOUS RESEARCH AND DEVELOPMENT



1,000 Programs – 4,000 Advisors – 50,000 Businesses



**National Association of
Certified Valuators and Analysts®**
THE AUTHORITY IN MATTERS OF VALUE®

PRECISION MARKETING: EVEN MORE OWNER CLIENTS



DISCOVER FIRST

ROUNDTABLE

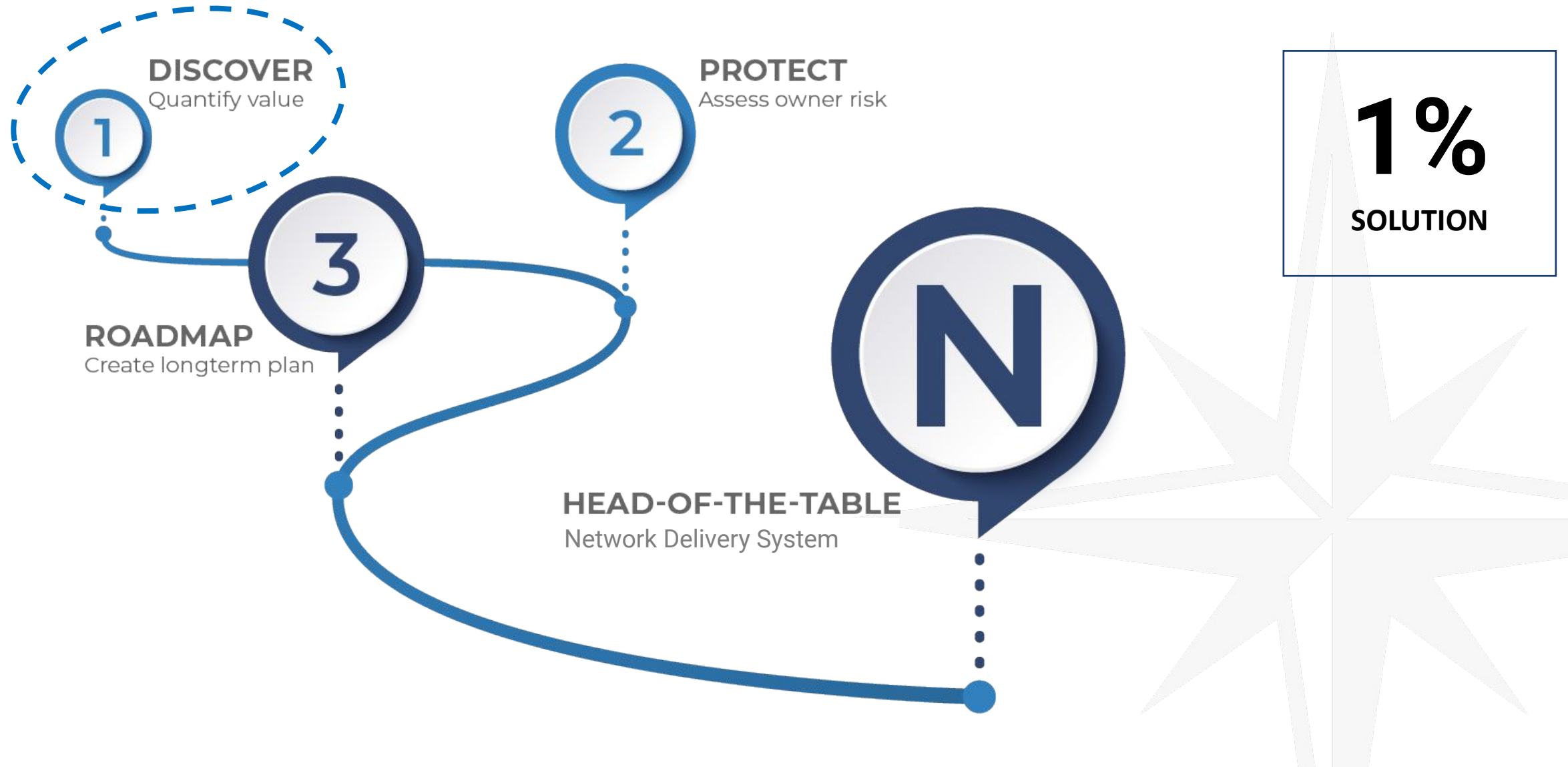
EXPERT NETWORK

CUSTOM BRANDED MATERIAL

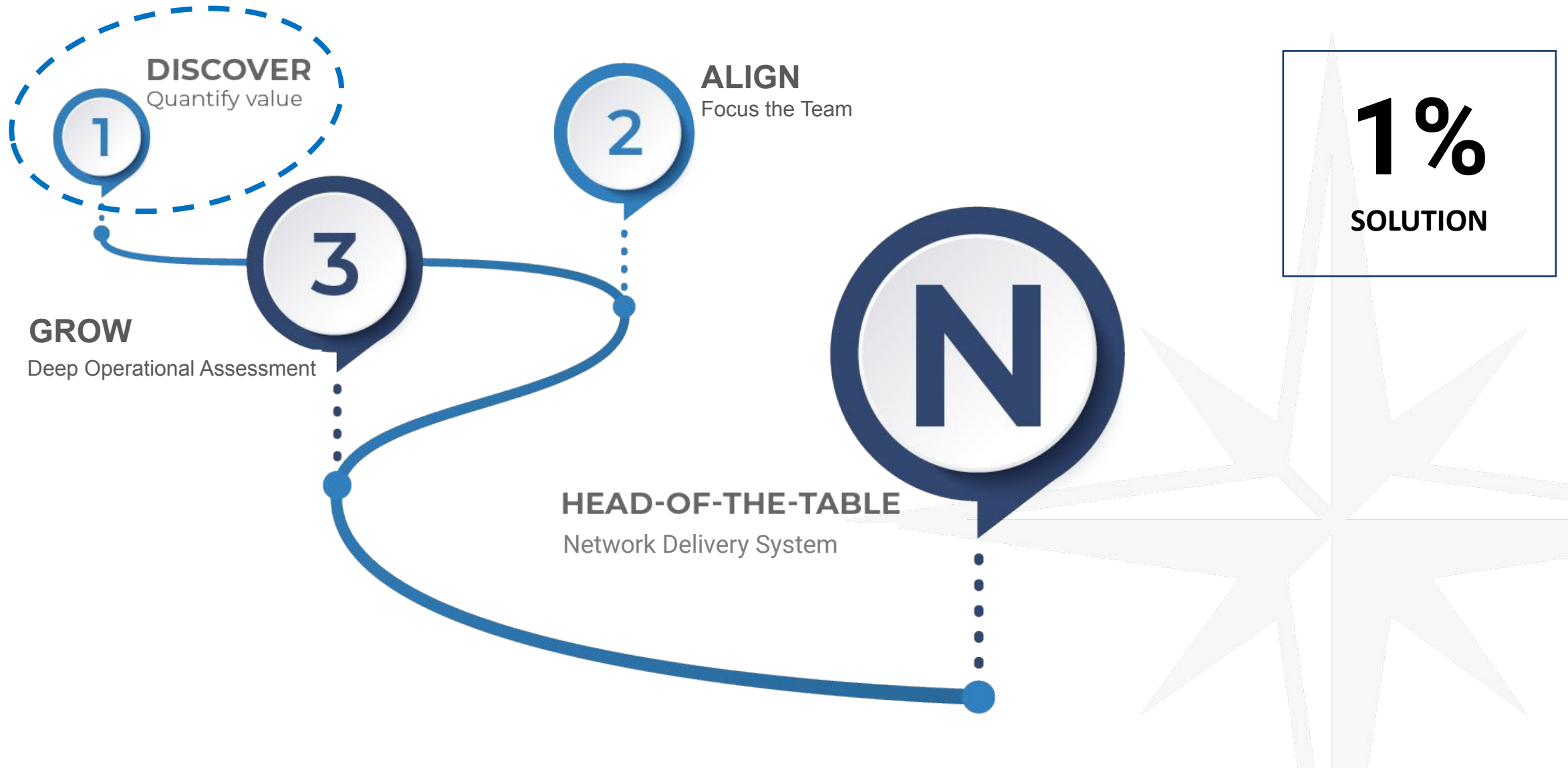
CONTINUOUS OWNER OUTREACH

CASE STUDY VIDEO

VALUCOMPASS SYSTEM: FINANCIAL ADVISOR



VALUCOMPASS SYSTEM: BUSINESS ADVISOR



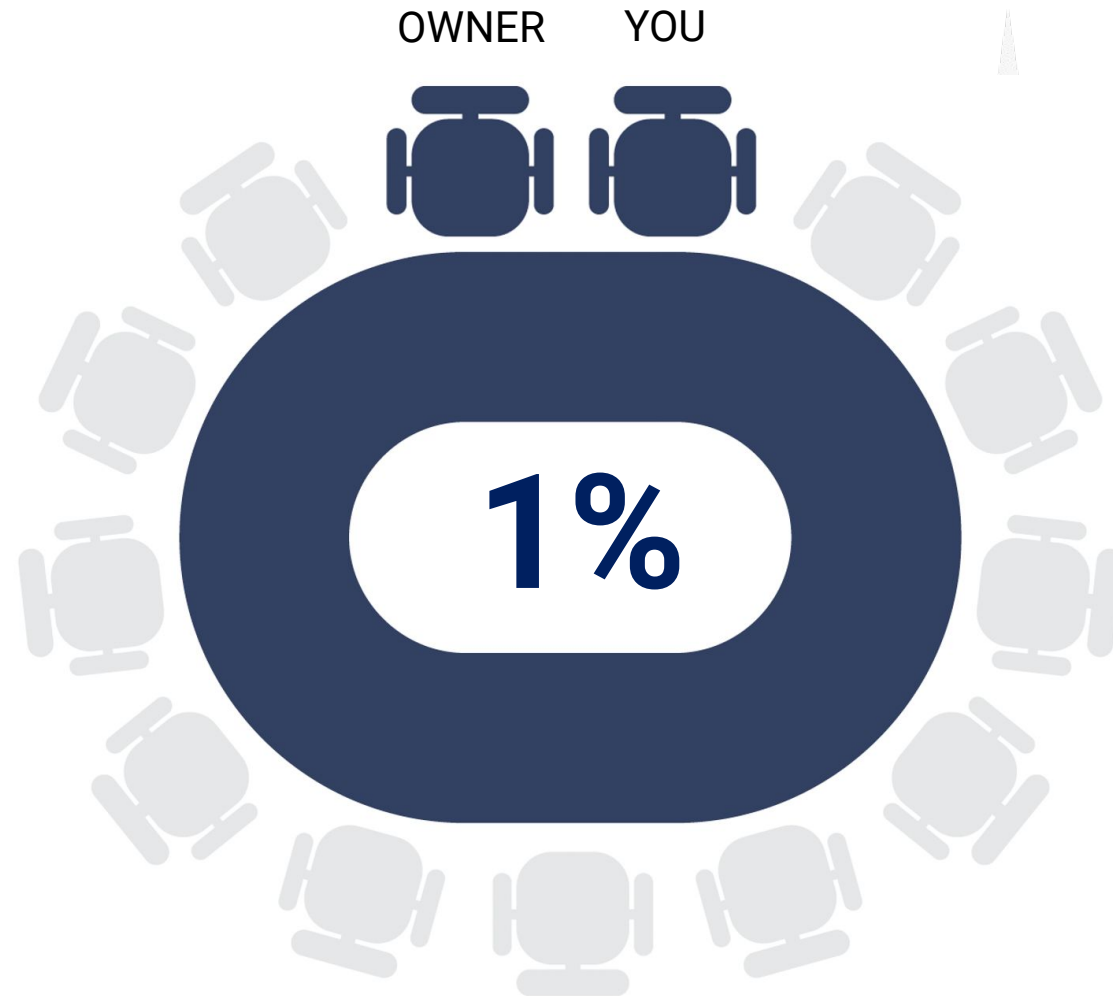


THE PLANNING TABLE

Experts at the Table

- Attorney
- Accountant
- Business Consultant
- Insurance P&C
- Retirement 401K
- Health Benefits
- Others as Needed

Powered by “Share”





Master Classes

Quarterly Owner Reporting

