

ROUNDTABLE WORKSHOP



Highlights

1. Marketing tool and powerful conference aid to grow your practice
2. Provides an aggregated Discover report for group of businesses
3. Report includes rich graphs and detailed comparisons
4. Report includes colorful graphs with anonymous results
5. Encourages business owners to reach out and learn more

Share Your Expertise

Roundtable is a marketing tool for business workshops where independent owners run individual Discover Assessments. This allows a group of business owners to complete the 18 Value Driver questions at the same time and provides anonymous aggregated results.

Wealth advisors will learn where they can best provide their services and open new opportunities. Business owners will understand the value of their business, see how similar businesses compare, and have a chance to ask important questions.

The compiled report provides Information on what these businesses need to grow and move forward. Align offers a fast and unique perspective on where businesses are struggling in addition to how working with a financial advisor can add positive value.