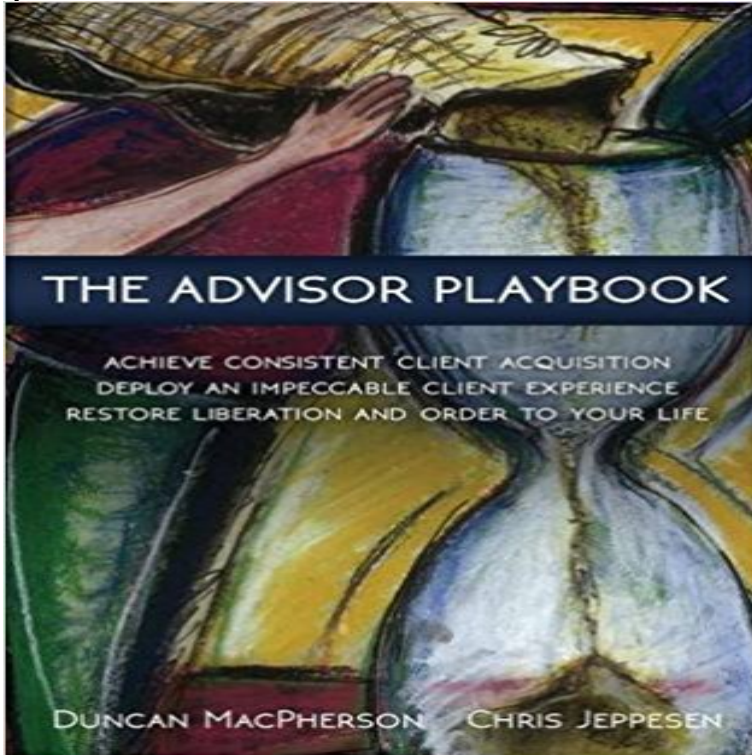


# The Advisor Playbook: Regain liberation and order in your personal and professional life



Practice management is often misunderstood. The Advisor Playbook will take the mystery away. Practice management is not confused with marketing, or is limited to strategizing about branding, or simply equated to old-school salesmanship. Practice management is how you build an organized toolbox of all your processes – branding, marketing, service activities, core functions – and constantly tune and keep that toolbox efficient and effortless. It’s a network of interrelated skills, processes and strategies that build value in a business while making it manageable, scalable and ensuring the owner runs the business and not the other way around. Duncan MacPherson and Pareto Systems have been in the forefront of practice management in the realm of the professional advisor for a quarter-century. Chris Jeppesen of First Trust brings his own decades of professional knowledge to the table. The processes in The Advisor Playbook have grown over those years, through constant refinement and improvement. They’ll help you to perform that same refinement and improvement on your business, and regain liberation and order in your personal and professional life. As you progress through the book, you’ll realize that each process is implemented in synergy with every other. Referrals are influenced by your service which is influenced by your process, which is influenced by your philosophy, which is influenced by your ideal client definition, life and business goals.

Nothing exists in a vacuum, and everything is, in the end, focused on a single unwavering goal: To build real, advocate relationships with your ideal clients that will generate both growth through referrals and the capacity for that growth. How you are perceived is key in every step of that circle, and readers who take on board what the Playbook outlines will come away with an understanding of how they are perceived, how to cast themselves as a consultant with a process rather than a salesperson with a quota, and will set a constantly rising bar for their own success. You'll be amazed at how common-sense most of the processes and strategies seem, and probably horrified at how often you've wandered from the path or failed to implement them due to a lack of clarity or simple distraction. The Playbook will guide you to an actionable plan and process that makes going to work a positive experience, and a positive investment.

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