

BAR Financial Customized Advisor Offerings



Practice Profile Benchmarking Metrics & Analysis

Client Acquisition, Marketing, Branding	Human Capital
Client Intake and Onboarding	Operational Efficiencies
Client Management, Retention, Tiered Services, & SLAs	Succession Planning/ Optimized Exit Strategy
Client Review Meeting Process	Investment Philosophy, Management, and Practices
Business Management & Goal Planning	Comprehensive Fee-Based Financial Planning

National & Regional Group Educational Trainings

Annual Kickoff Meeting	Annual Sales & Compliance Conference
Quarterly Meetings	Special Topic Meetings
Practice Profile/Deep Dive	

Individual/On-site Trainings

Annual Business & Goal Planning	Deep Dive Practice Profile & Follow Up
High-touch / HPA Review Meetings	

Conference Calls & Webinars

Monthly Sales Assistant Call	Quarterly Annuity Market Call
Leadership Council	Technology Trainings
Compliance & Paperwork	Docupace Trainings
Monthly Marketing Webinar	maA Advisory Platform
AdviceWorks/Technology	Special Topics Training

Customized Marketing Offerings

Brand Guidance & Development	Graphic Design Services
Personal Website Set Up	Timely Client Events & Seminars
Targeted Marketing Campaigns	Newsletters
Direct Mail Campaigns	Social Media Training & Coaching