

FINANCIAL ADVISORS

Accelerating growth through practice management, coaching, and value add

FLX Business Accelerator provides financial advisors with a comprehensive and customizable suite of coaching and practice management solutions to help navigate and thrive in the ever-changing financial landscape.



Advisor Coaching Services

Personalized coaching tailored to your specific needs, helping you maximize your growth and operational efficiencies.

Experienced team with deep expertise in the advisor space. FLX Business Accelerator's coaches average 25 years of specialized industry experience.



Resources to Grow Your Practice

Leverage our depth and breadth of practice management resources to effectively manage your entire practice and create differentiation versus your peers.

Access white papers, articles, templates and peer share/virtual events to have the tools and thought leadership necessary to succeed.

FLX Business Accelerator's Proven Three-Step Practice Optimization Approach

Our **customized but consistent coaching approach** is based on the unique needs of each advisor. We allow for tailored coaching models while following a consistent framework called **Practice Optimization**.

This framework focuses on individual growth opportunities and organizational improvements, equipping advisors with effective tools and strategies to enhance performance in key areas of their advisory practice.

1

Plan & Position: Define strategic direction and create a business and marketing plan that aligns with your goals and objectives

2

Execute & Engage: Implement effective programs, campaigns, and tactics to execute the plan and engage with clients, prospects, and Centers of Influence (COI)

3

Organize & Optimize: Ensure the practice is supported by the right team and infrastructure, manage resources effectively, and utilize tracking systems for consistent execution