



# Grow your practice through teaming

A good partnership can set your clients up for **great service** while setting your business up for **growth and success**.



## What are the potential benefits for you?

- You'll grow the business you own
- Spend more time prospecting and less time servicing clients
- Offer more holistic solutions
- Identify potentially unmet needs in your book of business
- You'll have more people to talk to
- It's a way to duplicate yourself in your business

## How can we help you?

- Find and hire quality people who will work well in your culture
- Provide training and prospecting support to help your team be more productive
- Market (and co-brand) your growing practice
- Plan for the future—contingency arrangements, your retirement, the succession of your business and the continued care for your clients
- Consultation on ongoing teaming details

## Additional support

- Best practices for staffing, including role and compensation planning
- Documentation for teaming agreements, business valuation, and succession plans
- Data analytics for block of business reviews
- Technology-enabled collaboration and communication among team members

## What is a team?

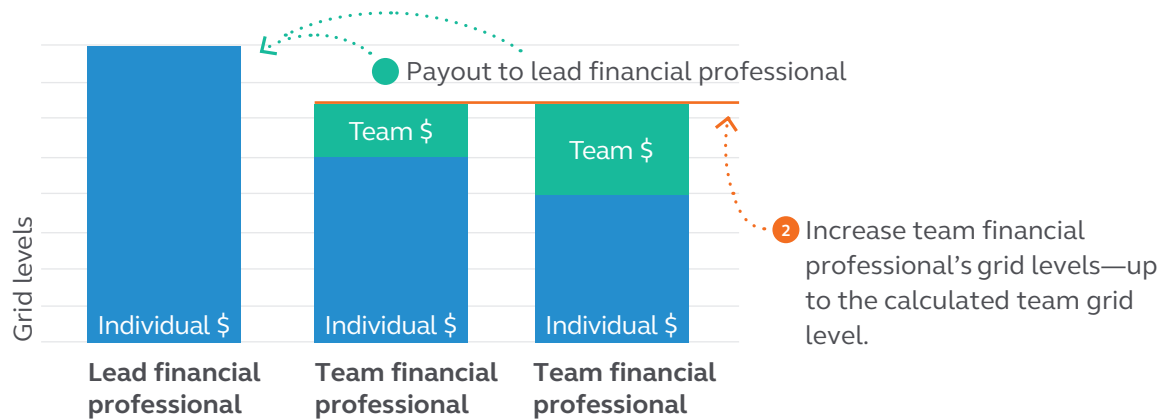
Two or more financial professionals partnering together with complementary skill sets, approaching the market and serving clients.

## How does compensation work?

As an approved formal team, the Gross Dealer Concession (GDC) of all team members are aggregated and divided by a weighted number of team members to determine a team grid level

### Two teaming compensation options

Use one or both options calculated for payout, up to a set maximum.



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