



Next Level

Clarity, solutions, and guidance to reach the next level of success

Join the award-winning Next Level coaching program starting November 19th! This edition of Next Level will be delivered in a hybrid format of a 1.5-day live kickoff event followed by five virtual sessions, paired with expert coaching.

Launched in 2008, the Next Level program has helped more than a thousand financial professionals grow their practices during prosperous and tumultuous times. They learned how to focus on growing their business and serving their clients even better, and so can you!

It is time to level-up to a higher stage of success by changing habits, maximizing productivity, and building stronger relationships with prospects and clients.



Why Next Level?

Our premier business development program builds on the proven success of our business consultations, focused coaching programs, and advice-based business model tactics. Our step-by-step approach will re-invigorate each area of your practice.



Why coaching?

Financial professionals who participate in a coaching program see a dramatic improvement in the quality of their practice, an increase in productivity, and confidence in their path to achieving important goals.

Live Kick-Off | Omaha, NE

LIVE WORKSHOP:

- Nov. 19, 2024 – 8:30 a.m. - 4:30 p.m. CT
- Nov. 20, 2024 – 8:30 a.m. - 12:30 p.m. CT

Plus

FIVE VIRTUAL WORKSHOPS VIA ZOOM:

Dec. 4 | Dec. 18 | Jan. 8 | Jan. 22 | Feb. 5

Must attend both the live and virtual workshops

\$2,999 – Includes Live Kick-Off Workshop, 5 Virtual Workshops, and bi-weekly individual coaching through May 2, 2025

Results

Next Level launched at the start of the 2008 financial crisis. The results are from participants in classes one through 28.

32%

Average increase of Gross Dealer Concession (GDC).

75%

Average increase of Assets Under Management (AUM).

1,000+

Financial professionals have participated in Next Level.

What to expect

Before	During	After
Before the live workshop, you'll complete an analysis of your current business, communication style, and client target markets.	You'll participate in one live 1½ day workshop and four virtual sessions, where you will be introduced to the Next Level tactics and have the opportunity to interact with your peers, learning and sharing best practices to implementing the Next Level concepts.	At the end of the program, you and your Business Coach will outline a personal plan for the future of your practice and the action steps necessary to bring your plan to reality.



Along the way, you will engage in bi-weekly conference calls with your business development coach who will lead you through the Next Level strategies, providing feedback, advice, and recommendations specific to your practice.

What you will learn

The Next Level tactics are designed to build on each other to help you level-up each area of your business setting the stage for maximum efficiency and profitability.

- Manage Your Personal Productivity to Focus on Business Growth
- Increase Revenue by Targeting New Ideal Clients
- Offer Value Through Intentional Services and Purposeful Pricing
- Create Your Go-Forward Business Plan
- Build the Client Experience that Grows Enterprise Value
- Uncover Opportunities Using the Next Level Discovery Conversation
- Create a Scalable Business to Manage Twice the Assets
- Refine Your Branding & Business Development Strategies

“Next Level was a tremendous experience for our advisors. Everyone had glowing remarks about the actionable items they picked up from each session. I can see how our advisors gained big increases of 40-50% year-over-year after the program, one of them even had 100% YOY growth! Next Level helps you put tactics into place, and it takes some effort, but you're building the system that is going to result in great productivity gains.”

— **Scott Armstrong / Managing Partner, Signature Financial Group / Next Level Graduate**

Who are we?

The Osaic Business Coaching & Consulting team supports financial professionals to improve the profitability, efficiency, and satisfaction of their practice through coaching, consulting, and technology.

Contact Business Coaching and Consulting

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