



Advisory business & WMP tools and resources to scale your business

Osaic Insights

Accelerate with advisory: multiply your value & revenue in 90 days



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Four-phase roadmap

01. Book 1:1 meetings with top clients

Actionable idea: while brainstorming, write down your top three clients and schedule a time in the next three months to set up 1:1 meetings. Premier Trust is a great resource that is in-house.

02. Become familiar with WMP partners & strategists

Landenberg is a great resource, along with our own Investment Advisory team. Both are experts at WMP and fostering growth for your business.

03. Annual insurance reviews

Once you have your top client list to focus on, Highland Capital is an excellent resource as you consider your annual insurance reviews.

04. ABFP: Attain an accredited behavioral finance designation

ABFP is designed for financial professionals looking to master behavioral finance soft skills to enhance financial planning advice and deepen client relationships. It consists of OnDemand classes, including 28 hours of instruction that can include CE for CFP, and a two-hour exam.

Get started today!

Download the 2024 WMP Overview Brochure [here](#) to get started.

Let us walk you through it

For additional questions, please reach out to Investment Advisory Consulting at ia@osaic.com.