



## **PCG EDUCATION & PRACTICE MANAGEMENT**

Your source for the tools, resources and educational opportunities you need to excel

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**RAYMOND JAMES®**

# “Execution starts with focus.”

– Jim Huling, author of *The 4 Disciplines of Execution*

As an industry leader in developing advisor and team resources, PCG Education & Practice Management is focused on providing the best available tools, resources and programs to help you manage your practice more effectively and accelerate your business growth. We understand you must have both flexibility and support to grow your business the way you want to. Our mission is to work with you and your staff in accessing the appropriate tools for the appropriate outcome. As your partner, and source of business advantage to you and your team, we are committed to supporting your efforts to grow new assets.



## PRACTICE INTELLIGENCE MODEL

Our first objective is to understand what you do – and how you do it – so that we can better organize all the tools and resources you will need for today and tomorrow. The Raymond James Practice Intelligence Model’s information-rich portal represents an established approach that provides a simple, step-by-step process to optimizing some or all of your practice – from attracting new clients to deepening time-honored relationships – while helping you assess and refine your business at every step. Each zone can stand alone, giving you the freedom to focus on only the parts of your practice that need the most attention. Included are insights on best practices, along with connections to dozens of toolboxes filled with practice improvement tools designed to help build your ideal practice.



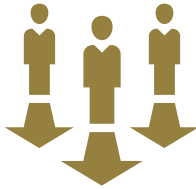
## PRACTICE INTELLIGENCE

Practice Intelligence is our award-winning practice management channel. It serves as a central hub where you can find practice diagnostic tools, a model to help you build success strategies, and best-practice tools shared by our partner firms, successful Raymond James advisors and other leading industry experts. In addition, we offer quarterly toolkits that include customizable resources on key growth strategies that are important to you, such as working with centers of influence, increasing referrals and introductions from existing clients, marketing, business planning and more, so that you can elevate your practice to the next level.



## START SMART ASSESSMENT

In talking to thousands of advisors over the years about their practice improvement needs, a common question has always been: “Where do I start?” The Start Smart Assessment was designed to help you identify areas of opportunities and strengths within your business so you can decide where to begin. It’s that easy. The 20-question assessment only takes a few minutes to complete. You’ll then be connected to all the resources you need that are exclusive to you and your business.



### PRACTICE INTELLIGENCE COACHING PROGRAMS

Are you reaching a plateau in your business? Our Practice Intelligence Coaching team can be your partner in providing more direct guidance around how to take your business to the next level. Our coaching team provides consultations to uncover improvement opportunities, group coaching for topic-specific programs with peer advisor collaboration, and personalized team coaching through our Elite Practice Intelligence Coaching (EPIC) program. Every coaching engagement begins with a Gap Analysis to determine the areas where we can best support your team to implement strategies that will elevate your practice and, to ensure you execute upon your action plan, your coach will serve as an accountability partner so that you may implement effectively and realize results. As a source of business advantage, our goal is to help you (and your team) get focused, take action and improve your practice.



### BRANCH EDUCATION

Your branch professional or service associate is a key partner in managing your client relationships and growing your practice. We have built a Branch Associate Development Center, which is a dedicated team focused on creating and supporting the educational and developmental opportunities to ensure our support teams are equipped with the resources they need to be most effective. In addition to support team tracks at the national and regional conferences, Raymond James offers educational programs and other conferences designed specifically for branch professionals and service associates.



### NEW ADVISOR TRAINING PROGRAMS

New advisors are vital to our ongoing success. The Advisor Mastery Program (AMP) is designed to help those new to the industry gain the key skills needed for a rewarding, successful career as a Raymond James advisor. The 24-month comprehensive education program employs a holistic approach to teaching technical and sales skills. AMP includes a combination of distance and mobile learning, education sessions at the home office, one-on-one coaching and senior advisor mentoring to position new advisors for success.



For each of us to continue to grow – both personally and professionally – we must continue to learn.

An evolving industry addresses the needs for innovative technology, revolutionary trends, high-level education, interpersonal and business development and interactive training. As our industry changes, so do your clients' needs, wants and expectations. Therefore, we must have the knowledge and agility to stay vital, relevant and productive.

### We must ask ourselves:

Am I making the best use of my valuable time?

Do I feel in control of my business?

Am I keeping up with my competition?

Am I at the top of my game?

PCG Education & Practice Management is here to provide you with best-in-class tools, powerful resources and a proven model to help manage your practice effectively and accelerate business growth – all while ensuring you have the flexibility and support to grow your business on your terms.

For more information,  
contact your recruiting partner  
at Raymond James.

# RAYMOND JAMES®

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