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Keys to Success for Branch Managers

In today's competitive financial marketplace, advisors need to know they have top people in their corner helping them to succeed.

SAN MARTIN, CA—August 12, 2009—Research from CEG Worldwide indicates that top-performing branch managers use four unique tactics to position themselves and their firms for success in all investment climates.

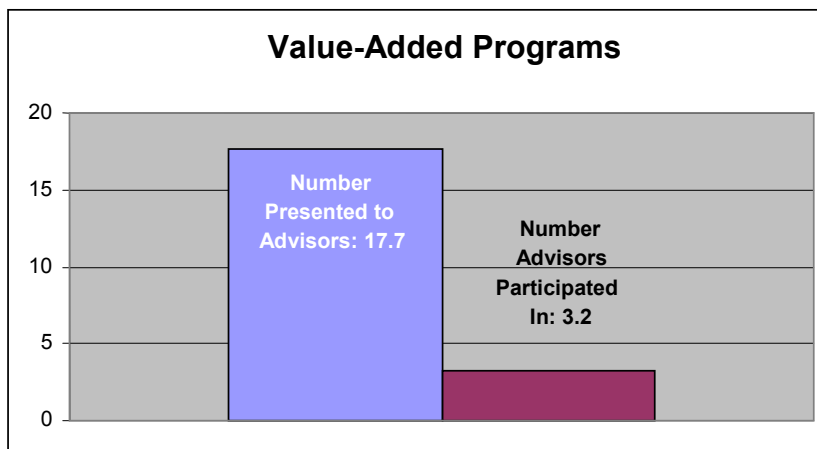
Top branch managers are more likely than their less-successful peers to have:

1. Identified a *compelling value proposition*
2. Written a *positioning statement*
3. Created an *elevator speech*
4. Constructed a *call to action*

Currently, most branch managers are not doing these things, and the result is a disconnect between them and the advisors they should be helping. “Our research indicates that top advisors over a recent 24-month

period were presented with 17.6 value-added programs and participated in only 3.2 programs,” says John J. Bowen Jr., founder and CEO of CEG Worldwide. “Most programs are not actionable, don't directly apply to the practices of top advisors or are presented by people who don't know the material well.”

Branch managers have to think in new ways to attract and retain the best



advisors. CEG Worldwide has created a five-step program that summarizes what branch managers should do to more effectively work with advisors.

1. Lead for change.

Now is the time for branch managers to step up to help advisors rebuild their practices and confidence as they acquire their share of the four out of five affluent investors who are considering switching advisors.

2. Deliver programs that give advisors immediate breakthrough results.

Advisors want programs that clearly present the best practices of other top advisors and provide actionable strategies and tactics that are relevant to their practices.

3. Focus on long-term results.

Immediate impact is important, but don't sell out long-term success for quick fixes that don't deliver sustainable results. For advisors to rebuild their practices to even higher levels of success, they need to fully implement the best practices of the top financial advisors.

4. Plan for success.

Great results are driven by great planning and execution. Don't be guilty of launch-and-leave. Recognize that you will have to walk the talk and deliver on your new consultative process. This isn't just about a few meetings—it's about a long-term commitment to success. Advisors understand that building a practice is not about holding a client seminar—it's about changing the way they run the practice.

5. Spread the word.

Success breeds success. The more you promote the early wins of your top advisors, the more likely other advisors will look to your branch and not to your competitors.

About CEG Worldwide, LLC

CEG Worldwide is passionate about coaching financial advisors and institutions to build a Simple and Elegant Wealth Management BusinessSM. Using state-of-the-art research methodologies and analysis combined with proven strategies and tactics for building highly successful advisory practices, CEG Worldwide provides uniquely powerful insight into what allows elite financial advisors to thrive.

CEG Worldwide delivers fully scalable financial advisor training programs at many of the world's largest financial institutions. The firm's proprietary institutional strength intelligence is based upon empirical studies of more than 10,000 advisors and 14,000 high-net-worth individuals. By combining research expertise with pragmatic and proven business experience, CEG Worldwide helps institutions achieve measurable gains in productivity, retention and assets under management and provides advisors with proven business-building strategies and tactics.