



**The Elite Adviser**

## **INSTITUTIONAL STRENGTH INTELLIGENCE**

**The pursuit of excellence demands groundbreaking practices, acute insight and expert skills. Backed up by decades of rigorous study and practical application, the industry leaders at CEG Australia deliver precisely the tools and strategies you need to reach the elite level.**

## **Key Steps to Success in Wealth Management**

*By Jim Stackpool  
Managing Director, Strategic Consulting & Training*

As we've seen again and again, wealth management is proving itself - hands down - to be the best business model for supporting adviser success. The comprehensive, consultative nature of wealth management allows wealth managers to optimally address their quality clients' needs with a broad range of advanced solutions while deepening their client relationships - and get paid handsomely for delivering that value.

Why then are so few advisers acting as wealth managers? Although there are many reasons, they add up to one conclusion: Providing wealth management is extremely challenging. Wealth managers must find and attract the type of quality clients who require advanced wealth management solutions. They must build close consultative relationships with those clients to uncover their most important financial needs. They must also accurately assess the merits of a broad range of alternatives in products and services that truly add value and help solve those needs.