

WHAT WE DO



- 01 GROW**
Help growth-minded advisors gather new assets and increase revenue.
- 02 INSPIRE**
Inspire advisors to mold the business they envision through our Blueprinting Process.
- 03 SYSTEMATIZE**
Enhance advisor office productivity and efficiency through our proven systems, templates, and processes.
- 04 GUIDE**
Guide advisors through human capital challenges and provide insight on how to manage staff.



Digital Fortress

In addition to our specialized one-on-one coaching, we offer advisors access to a marketing and practice management command center that allows advisors to build their business through a number of digital marketing tools including a personalized website, branded app, turnkey content, social media, and Peak Advisor Alliance's best practice management tools.

Learn more about Digital Fortress at www.peakadvisoralliance.com.

Proven Growth



23% of Peak members are Million Dollar Producers

80% produce over \$500k

Peak members have grown by 2.5x over a 2-year period. Far exceeding the annual growth rate of the Market*

* 2012 INVESTMENTNEWS/MOSS ADAMS Financial Performance Study of Advisory Firms

2.5x

WHY PARTNER WITH PEAK ADVISOR ALLIANCE

Peak Advisor Alliance is the premier advisor coaching and practice management program in the industry. Based on the knowledge and experience of Ron Carson and over 1,000 advisors across the country, Peak's programs offer expert financial advisor coaching, timely FINRA-reviewed content, and a passionate community of elite advisors. We focus on helping advisors identify and develop their total vision—of life, work, family, clients—and provide a comprehensive combination of one-on-one coaching and robust online resources including personalized websites, apps, and social media content.

Join Peak Advisor Alliance

Call us today at **(800) 514-9116** to learn more about how we can improve your practice. We look forward to having you in our passionate community!