

The Ensemble Management Institute

Advanced process for building the financial advisory firm of the future

May 15 – 17, 2013
St. Julien Resort
Boulder, CO

“The most comprehensive bundle of information in one place at one time about what you need to be doing to truly evolve into a successful ensemble practice. Truly a "class act" experience.”

Mike Searcy
Founder and President
Searcy Financial Services
Participant

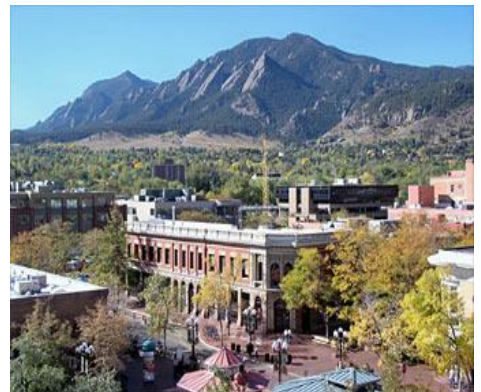
For additional information call
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Capacity is limited to 14 firms with no two firms from the same market. Institute enrollment ends on April 15th.

Join us for **The Ensemble Management Institute - Business Foundations Session**, a unique intensive program of business management classes for independent advisory firms. Targeted at the top firms of the future – those with established business success but looking to grow and improve, the Institute brings together non-competing firms with rich experience and expertise they can contribute to the session.

Philip Palaveev, CEO of the Ensemble Practice is joined by industry leaders Bob Veres, Erin Kincheloe and Tim Welsh to deliver an MBA-style program in Financial Advisory Firm Management.:

- Covers Strategy, Growth, Human Capital, Operations and Financial Management
- Delivers customized business plan for your firm
- Looks for areas of improvement and untapped growth opportunities
- Dynamic and small group sessions



COURTESY: CITY OF BOULDER

Personalized Program

One of our senior consultants will conduct a detailed assessment of the needs of your business prior to the session. This allows us to develop a better understanding of your priorities, make the content of our discussions more relevant and use the time during the session to delve right into solving the challenges you face.

Learn from Each Other

The firms participating in the first Ensemble Institute in February, 2013 managed over \$3 billion in assets under management combined and brought tremendous expertise and experience in different markets. The extensive interaction between the participating firms allows them to exchange best practice and learn from each other's experience.



Ongoing Collaboration and Support

Attending the Business Foundations Session provides you with a quarterly follow-up and implementation support, including access to The Ensemble Practice consulting team and membership to the Institute's private secure social network to continue to exchange ideas, comment on trends and share milestones with other alumni of the session.

