



STANDARDS
INTERNATIONAL®

'SCALE, SUSTAIN, SELL'

Preparing your business for the next chapter

Introduction

Do this right, and once will be enough!

The financial services landscape is evolving rapidly, driven by technological advancements, changing client expectations, employee wellbeing and behaviours and regulatory shifts. To thrive in this dynamic environment, financial planning and advice firms must understand where and how to pivot these challenges to leverage their untapped potential.

This workshop has been created to teach financial advice & planning firms how to adapt to challenges, sustain growth over the long term and capitalise on their efforts to date which will empower you with the skills needed to withstand change, enhance your assets and effectively achieve growth and their goals.

Learning outcomes

By the end of this workshop, you will be able to:

- Have an understanding of the Key Trends and the future of the Financial Services profession
- Understand the current value within your financial planning firm
- Establish and embed your business goals and objectives
- Explore strategies for scaling, sustaining and/or selling your financial planning firm
- Understand the challenges and risks associated with your next step of growth or exiting



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Topics covered:

Module 1: Understanding and assessing your Business and its potential.

Module 2: Strategies for Scaling and /or selling

Module 3: Strategies for creating sustainability and calm

Module 4: Workshop wrap up and next steps

Workshop length

1

day

Core competencies taught

- Client Relationship Management
- Strategic Thinking & Planning
- Risk Management & Adaptability

APPLY NOW



Online workshop

Business bespoke

Who should attend?

Business owners and/or
Business/Operations
Managers in financial services
firms who are looking for
guidance on the next steps in
business planning.

What to expect?

- Engagement and discussions
- CPD certificate (e-certificate)
- Capped class sizes
- Workbook and action plan
- Knowledgeable trainer