CSP can be your resource to bring more value to your clients!

We know that advisors may have reservations about stepping into unfamiliar territory…

"I don't know anything about those areas and am not the right person to be providing my clients with advice."

"I have a good practice focused on personal financial planning and don't want to change the way I do business."

"My business-owner client has a CFO and a CPA - I'm sure they're providing the advice and solutions she needs to address the business issues."

Don't let past assumptions limit your future success.

"By using the Collaborative Services Platform, I have been able to substantially improve my business — both in terms of client service and profit. Offering new ideas to my high net worth clients (who are often business owners) is setting me apart in the increasingly competitive trusted-advisor marketplace. The CSP expertise and back office support is unmatched and allows me to compete nationally against banks, brokerages, and large insurance conglomerates. It is clear to me, that even with one client opportunity, I can double my business. ***The CSP training session is a must for any top advisor!"***

~ Bobby White, Securities America Representative

"Understanding the possibilities will enable you to discuss the issues with clients and bring in professionals who can provide solutions."

~ Brett Ellen, CFP®, President, American Financial Network
Founder, Collaborative Services Platform

To learn more about CSP, or to become a member, contact:

Denise Villanueva
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Collaborative Services Platform

You can be a part of this team of champions.

Are you looking for ways to add value to your client relationships?

Do you want to build your practice and attract new clients?

Are you ready to partner with best-in-class industry experts to help your clients?

If you are ready to gain a new perspective on your business, join the Collaborative Services Platform to enhance, differentiate and grow your practice.

Call **Denise Villanueva** at **(818) 264-4989** for more information

Tremendous Opportunity

If you work with high net worth clients, you know that many of them are business owners or senior executives with an array of business-related financial challenges. These challenges might have to do with corporate benefit programs, growth and exit strategies, deferred compensation solutions, tax strategies or insurance plans. Your clients may want help with these issues. As their trusted advisor, you are in a perfect position to provide the resources and support they need. If you're not addressing these needs, you're missing a huge opportunity.

There are more than 275,000 mid-market companies in the United States. With revenues between $5 million and $500 million, these businesses generally have a small group of decision makers who can listen to recommendations from trusted advisors and make decisions quickly about how to move forward. Imagine the value you'd bring to your business-owner clients if you could be their go-to advisor for all of their business-related issues.

The Help You Need

The Collaborative Services Platform (CSP) is a strategic planning approach that addresses business and executive financial needs. It would be nearly impossible for an individual financial advisor to have the range and depth of expertise in all of the areas that must be addressed by business owners. So we've brought together a team of some of the most respected and accomplished professionals in the financial, business, legal and benefits arenas to enable CSP member advisors to provide greater overall value to clients through access to more intellectual property, services and products.

Core Components of the CSP

- **Corporate Benefit Advisory Services** – A compensation and benefit advisory team analyzing and implementing executive compensation, qualified and non-qualified plans, deferral plans, custom group life, captives, other company-funded programs, business strategies and more
- **Premium Executive Planning** – A customized, comprehensive financial planning and wealth management program for corporate executives and key employees
- **Financial Solutions Alliance (FSA)** – Comprised of some of the most respected and accomplished professionals in the Financial, Business and Legal arenas, the FSA is one of the most comprehensive financial service networks assembled

How It Works

If you are an experienced successful advisor, you are well positioned to provide existing and prospective high-net-worth clients with services to meet their personal and business-related needs. As a CSP member, you will gain an understanding of the complexities and nuances of cost-effective, tax-wise solutions to typical business management challenges.

CSP Summit

In becoming part of CSP, you will have access to an exclusive 2-day summit focused on four key practice areas: Financial Planning, Asset Management, Risk Management and Corporate Benefits Services. The program is conducted by leading experts who have worked extensively with owners/executives of middle-market private and public companies.

The summit serves several purposes. It will help you understand the intricacies of the types of problems that CSP can help you solve - whether it's how to create and implement a risk management strategy for a 15-doctor medical practice or how to structure a deferred compensation plan for top executives in a $500 million technology company. As a CSP member, you won't have to know how to analyze and structure these solutions on your own. But understanding the possibilities will enable you to discuss the issues with clients and bring in professionals who can provide solutions.

The 2-day summit will also provide a foundation for you to begin to develop content expertise. The more familiar you become with your clients' needs and business challenges, the better able you will be to participate in developing solutions, with the support and counsel of the CSP's alliance partners.

Whether you choose to become a subject matter expert and participate in developing solutions, or simply identify opportunities and rely on CSP partners for full support, your increased awareness and expanded knowledge base will help you provide more valuable advice to clients in your existing personal financial planning engagements. In addition to becoming a more valued advisor for your clients, you will benefit from the incremental revenue from consulting fees and product commissions. These fees will be shared with the other professionals who help you with a given solution, but you will experience an organic growth in your practice and your service areas.

Ongoing Support

In addition to the 2-day summits (held 2-4 times per year), CSP members participate in Monthly Continuing Education Calls. These offer an opportunity for CSP members to benefit from regular presentations from a variety of subject matter experts.

Members are also invited to participate in Weekly Opportunity Calls. During these calls, advisors bring client scenarios to discuss, and are able to brainstorm with the team about possible solutions, identify resources and plan next steps.

Continuing Education

The CSP sessions will provide you with continuing education credits. Fifteen hours of CE credit will be granted by the CFP® Board. In addition, this program satisfies the requirements for PACE Recertification credit for ChFA and CLU designations, providing 15 hours of credits.