



## Helping Great Advisors Build Great Businesses

What's Next, a BPAS service, brings professional coaching and consulting services to financial advisors looking to build a more efficient, more profitable business. As veteran financial advisors and practice development experts, we've walked in your shoes. With more than 75 years of experience and success, we help clients learn how to take their businesses to the next level.

**“Working with What's Next has been a game changer.”**

*—Advisor Client in Utah*

### Your Path to Success

Using our **What's Next Tailored Solutions System (WNTSS)**, we design a strategic road map to show clients how to grow their business with a strong alignment to their business, personal, and life goals. The WNTSS is an easy 4-step process includes:

- 1 Engagement**  
Learn about you and your business to determine the most appropriate level of engagement for your success.
- 2 Discovery**  
Meet with you and your team members to understand your vision, challenges, and perspectives so we fully understand and respond to your needs.
- 3 Road Map**  
Work together to create a customized strategic plan that fits your specific needs and then help get it done.
- 4 Success**  
Celebrate milestones and identify the next steps for success and how we will help you get there.

### Coaching Services Menu

We provide a balance of coaching and consulting to help financial advisors create the right strategic plan and follow through. Specialty coaching services include:

- Strategic Planning
- Staffing & Compensation
- Operations
- Financial Management
- Culture
- Leadership Development
- Client Acquisition
- Branding & Marketing
- Succession Planning

**“The What's Next team has been instrumental in creating the organizational foundation that's allowed me to grow my practice to levels I never thought possible.”** *—Advisor Client in California*

**Ready to take your business up a notch?  
Let's Talk.**

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