



Empowering Success at Cornerstone Planning: Tech Consultations & Internal Coaching

At Cornerstone Planning Group (CPG), we pride ourselves on providing top-notch service to our clients, which starts with ensuring our advisors have the necessary tools and support to succeed.

We understand that the key to success lies in equipping our advisors with the technology and resources they need to provide comprehensive financial planning services. That's why we have implemented two unique programs to make sure our partnered advisors and their staff can hit the ground running: tech consultations and internal business coaching.

Tech Consultations: A Partnership for Success

When a new advisor joins our firm, we know that they bring a wealth of expertise and experience to the table. However, we also recognize that getting acquainted with new technology and systems can be a daunting process. That's where our tech consultants come in.

Our in-house tech consultant meet with each newly recruited advisor and their staff to ensure a smooth onboarding process. They guide the team through the intricacies of our technology stack, assist in setting up customized marketing strategies, and help integrate

their existing processes into our systems. By taking this hands-on approach, we make sure that our advisors can focus on what they do best – helping their clients achieve their financial goals.

The consultant is available anytime to the advisor and their team for ongoing questions and training. On a quarterly basis, the consultant reaches out to check in to see if anything is needed and to give a “State of the Union” so the advisor is aware of any updates or changes.

Internal Business Coaching: A Support System to Thrive

In addition to our tech consultations, we also offer ongoing internal business coaching to our advisors. Having a dedicated business coach means that our advisors have access to a professional who can provide guidance, mentorship, and support in a day-to-day environment. This coaching program aims to help our advisors build their practices, grow their client base, and maintain a healthy work-life balance.

The business coaches work closely with our advisors to identify areas of improvement, set goals, and devise strategies to achieve those objectives. By providing access to this valuable resource, we enable our advisors to continually grow and develop both personally and professionally.

The Cornerstone Planning Support Team: A Comprehensive Approach

Our commitment to our advisors doesn't end there. CPG has an internal support team dedicated to providing top-notch administrative and technical assistance. This support team ensures that our advisors can focus on their clients without being bogged down by the mundane tasks that come with running a business.

From managing compliance issues to providing guidance on client management software, our support team is always ready to assist our advisors in maintaining a seamless operation.

At Cornerstone Planning Group, we believe that the success of our advisors is the foundation for the success of our clients. By offering tech consultations, internal business coaching, and ongoing support, we ensure that our advisors are well-equipped to provide exceptional service and create lasting relationships with their clients. As a result, our firm continues to grow and thrive as a leader in the financial planning industry.

Reach out to Carmine today and discover how partnering with Cornerstone can help you transform your practice and achieve the success you've always desired.

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