

BECOME A MEMBER OF THE INSTITUTE OF ADVISORS

ONLY \$299 PER ANNUM / ACCESS RESOURCES VALUED AT OVER \$10,000

RECEIVE ACCESS TO HUNDREDS OF PAGES OF CONTENT, VIDEOS AND RESOURCES TO GROW YOUR PRACTICE.

- Free Advisory Resources
- Client Growth Workbook
- Practice Development Workbook
- Mini MBA client templates
- Free Advisory Educational Webinars
- Free recordings to past webinars
- Live Community Q&A
- Certification or Institute logo use**
- Extension of Course*
- Credibility and integrity
- 6 Month voucher course discount



LOOK LIKE A LARGE ESTABLISHED PRACTICE OVERNIGHT

Your membership package includes

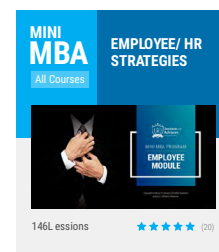
1 INSTANT CLIENT COACHING PROGRAMS



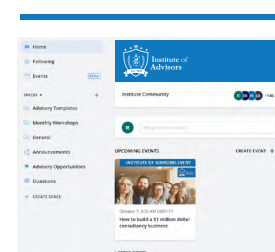
2 BUSINESS ARTICLES



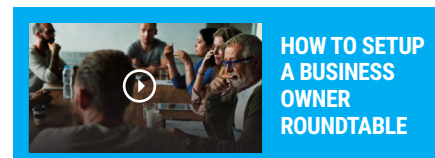
3 MINI MBA PROGRAM



4 ACCESS TO OUR WORLDWIDE ADVISOR COMMUNITY



5 WEBINARS AND WORKSHOPS



6 TIPS FROM THE EXPERTS



7 RIGHTS TO USE THE INSTITUTE LOGO



12 MONTH COACHING & ADVISORY PROGRAMS

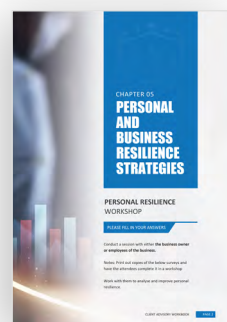
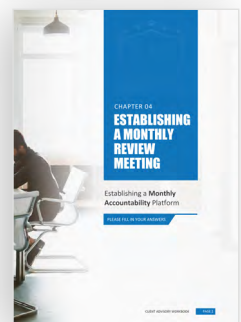
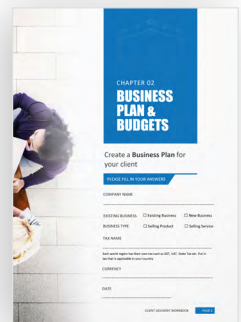
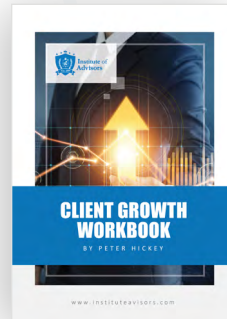
RECEIVE ACCESS TO CLIENT WORKBOOKS AND COACHING PROGRAMS.

THIS PROVIDES THE ADVISORY FRAMEWORK FOR GETTING STARTED WITH CLIENTS

HUNDREDS OF PAGES THAT SHOWS "STEP BY STEP" HOW TO HELP A CLIENT GROW THEIR BUSINESS.

ALSO INCLUDES A PRACTICE DEVELOPMENT WORKBOOK TO GROW YOUR PRACTICE

***Note** General members have the rights to access the PDF versions of these workbooks. Educational Members have the editable workbooks and can place their logo next to the Institute logo



WEBINARS AND WORKSHOPS

Regularly updated videos and workshops



**HOW TO SETUP
A BUSINESS
OWNER
ROUNDTABLE**



**HOW TO BUILD
A MILLION
DOLLAR
CONSULTING
PRACTICE**



**EXAMPLES OF
HOW TO BUILD
A SUCCESSFUL
PRACTICE**



**7 TIPS TO
CONDUCTING A
GREAT CLIENT
DISCOVERY
MEETING**



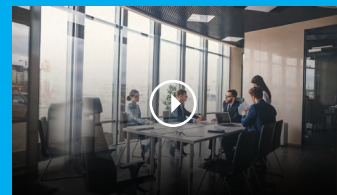
**VALUE
ENHANCEMENT
FORM YOU CAN
USE WITH A
CLIENT**



**PERSONALITY
PROFILING
TIPS**



**HOW TO PROVIDE
CLIENTS
WITH GREAT
STRATEGIC
ADVICE**



**HOW TO
LEVERAGE YOUR
PRACTICE TO
MAKE MORE
INCOME**



**HOW TO
KICKSTART
YOUR ADVISORY
PRACTICE**



**HOW TO
CREATE MORE
MARGINS,
PROFIT AND
CASH**

**AND MUCH MORE.
NEW VIDEOS RELEASED
EVERY MONTH**



MINI MBA PROGRAM

MINI MBA
All Courses

BUSINESS STRATEGIES




106 Lessons ★★★★★ (20)

The cover for the Business Strategies course features a man in a suit pointing at a line graph on a screen. The course title 'BUSINESS STRATEGIES' is prominently displayed in a blue box.

MINI MBA
All Courses

CUSTOMER STRATEGIES




117 Lessons ★★★★★ (20)

The cover for the Customer Strategies course shows a man in a suit holding a tablet displaying a bar chart. The course title 'CUSTOMER STRATEGIES' is highlighted in a blue box.

MINI MBA
All Courses

MARKETING STRATEGIES




195 Lessons ★★★★★ (20)

The cover for the Marketing Strategies course depicts a hand holding a glowing globe with various icons. The course title 'MARKETING STRATEGIES' is shown in a blue box.

MINI MBA
All Courses

EMPLOYEE/ HR STRATEGIES




146 Lessons ★★★★★ (20)

The cover for the Employee/HR Strategies course features a man in a suit adjusting his tie. The course title 'EMPLOYEE MODULE' is displayed in a blue box.

MINI MBA
All Courses

INNOVATION STRATEGIES




120 Lessons ★★★★★ (20)

The cover for the Innovation Strategies course shows a hand holding a tablet with various icons and a glowing effect. The course title 'INNOVATION & CREATIVITY' is highlighted in a blue box.

MINI MBA
All Courses

SUCCESSION & EXIT PLANNING STRATEGIES



41 Lessons ★★★★★ (20)

The cover for the Succession & Exit Planning course depicts a silhouette of a person standing on a rock, holding a flag. The course title 'SUCCESSION AND EXIT' is shown in a blue box.

MINI MBA
All Courses

PROFIT STRATEGIES




155 Lessons ★★★★★ (20)

The cover for the Profit Strategies course features a glowing line graph on a dark background. The course title 'FINANCIAL & PROFIT MANAGEMENT STRATEGIES' is displayed in a blue box.

MINI MBA
All Courses

RISK MANAGEMENT STRATEGIES



46 Lessons ★★★★★ (20)

The cover for the Risk Management course shows a hand holding a pen over a row of wooden blocks. The course title 'RISK MANAGEMENT' is highlighted in a blue box.

MINI MBA
All Courses

SALES STRATEGIES



117 Lessons ★★★★★ (20)

The cover for the Sales Strategies course depicts a hand pointing at a glowing line graph on a screen. The course title 'SALES MANAGEMENT & SALES STRATEGIES' is shown in a blue box.

ACCESS OUR MEMBERS COMMUNITY PAGE

Connect with **like-minded** advisors and **grow your network**



The screenshot shows a user interface for the Institute of Advisors community page. On the left is a navigation sidebar with options: Home, Following, Events (marked BETA), SPACES (with a plus sign), Advisory Templates, Monthly Workshops, General, Announcements, Advisory Opportunities, Questions, and CREATE SPACE. The main content area features the Institute of Advisors logo (Est. 2009) and the text 'Institute of Advisors'. Below this is a section for 'Institute Community' with a plus sign and a row of profile icons labeled IE, DB, MS, LB, and +146. A text input field with a green 'IE' icon and the placeholder text 'What's on your mind?' is present. Underneath is an 'UPCOMING EVENTS' section with a 'CREATE EVENT +' button. An event card is displayed with the title 'INSTITUTE OF ADVISORS EVENT', a photo of a group of people, and the details: 'October 7, 8:30 AM GMT+11' and 'How to build a \$1 million dollar consultancy business'. At the bottom of the main area is a 'LATEST POSTS' section.

Join our rapidly **growing Institute Community** and gain access to new and interactive opportunities, resources, and events.



STAND OUT FROM THE CROWD

BUILD YOUR CREDIBILITY

Show your clients that you are a **certified business professional** With an Institute membership, enjoy full use of our certification logos on your LinkedIn, email, and website.

NEW MEMBERS

If you have just joined us in our membership program, you can still use the Institute logo in your signature and on your website. This right is subject to you abiding by our code of ethics.

Proud member of...



EDUCATIONAL MEMBERS

If you are doing the course. **Membership** allows you to extend your course for another **12 months**.

And after you successfully complete the **CPBA course**, the membership fees also gives you the right to use the Certified Professional Business Advisor logo in your marketing.



OVER 1000 BUSINESS TIPS, ARTICLES AND VIDEOS

We have an extensive advice platform that can provide you with advice with dealing with client issues and management strategies.

- Marketing
- Human Resources
- Business Planning
- Financial Management
- Health & Safety
- Policies & Procedures
- Quality Assurance
- Security

WORKING AS A TEAM TO CREATE A SUCCESSFUL BUSINESS



BY IOAADMINE SEPTMBER 6, 2018

Teams, in one form or the other, are often at the heart of many businesses. The ability of a team...

WORK RELATIONSHIPS AND GOOD MANAGEMENT



BY IOAADMINE SEPTMBER 6, 2018

It's not always easy to know where to draw the line between being a friendly boss and being a...

WORDS OF WISDOM

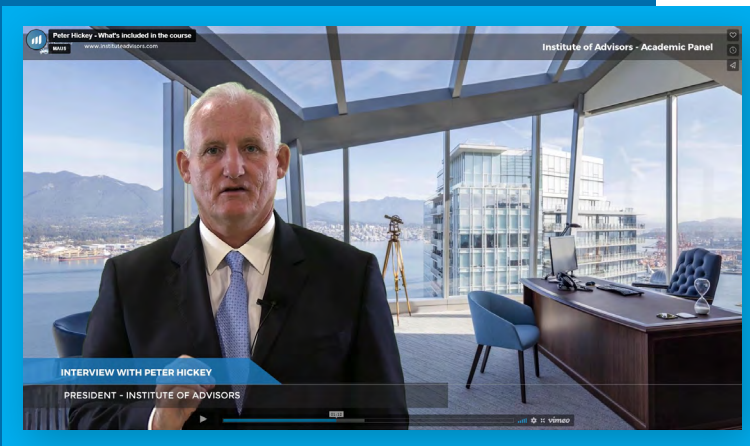


BY IOAADMINE SEPTMBER 6, 2018

Ever had "one of those days"? Here are some tips that will help you avoid becoming entangled in "no-win" situations...

INTERVIEWS WITH SUCCESSFUL ADVISORS

PLUS hundreds of interviews with successful business advisors and consultants that covers everything from starting your practice to marketing and selling yourself.



PETER HICKEY

BY IOAADMIN MARCH 20, 2022

Providing good strategic advice. Peter provides a “step by step” framework on how you can offer good advice to your clients.

As the founder of the Institute of Advisors, Peter has had first-hand experience with thousands of advisors around the world and their client issues. Peter will show you how to package and lift your advisory services so you are treated more as a valuable board member rather than a consultant.

**SIGN UP NOW
AND BECOME A MEMBER**

www.instituteadvisors.com/membership



DAVID BLAIR

BY IOAADMIN MARCH 20, 2022

Long term value generation. David gives his insight and experience behind long term value generation. David is just one of ...



REBECCA DEAN

BY IOAADMIN APRIL 20, 2022

Identifying your values. Rebecca encourages all business owners to identify what is really important and examine who they are...



PETER HICKEY

BY IOAADMIN MARCH 20, 2022

Providing good strategic advice. Peter provides a “step by step” framework on how you can offer good advice to your clients...



KARIN ROOK

BY IOAADMIN AUGUST 18, 2022

Building a successful practice. Karin provides tips and advice on accelerating a typical advisory practice...



JOE WOODARD

BY IOAADMIN MARCH 20, 2020

Why it is important to have a strategic plan. Joe shares his previous experience with clients and why it is ...



JAMIE BLACKMAN

BY IOAADMIN MARCH 20, 2020

How to build a successful practice. Jamie offers some insight into what the key drivers are in establishing a successful ...



PHIL ROBERTS

BY IOAADMIN MARCH 20, 2020

The importance of presentation. Phil gives some advice on the importance of dressing appropriately for client meetings. Phil just one ...



LINDA HAMILTON

BY IOAADMIN APRIL 20, 2022

How to exit a business. Linda provides insights on how she talks to business owners about their exit strategy...



PETER CHRISTMAN

BY IOAADMIN MARCH 20, 2020

Difference between a Good Advisor vs Poor Advisor. Peter talks through the difference between good and poor advisors.....

