

THE CONSULTANT & ADVISORY TOOLKIT

ACCESS RESOURCES VALUED AT OVER \$10,000. INCLUDES 12 MONTHS MEMBERSHIP

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

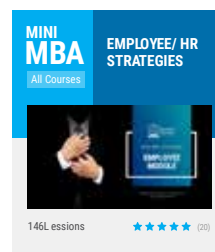
1 INSTANT CLIENT COACHING PROGRAMS



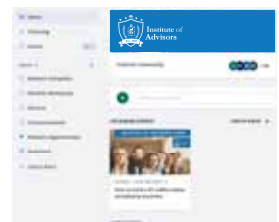
2 BUSINESS ARTICLES



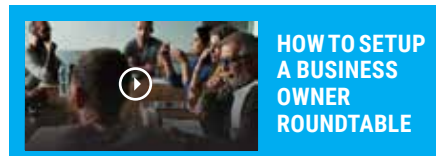
3 MINI MBA PROGRAM



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. You have full rights to display videos, use material whilst you are an active financial member. Package includes 12 month membership. Renewal at the end of 12 months is \$299.



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)

MINI MBA
All Courses


CUSTOMER STRATEGIES



117 Lessons ★★★★★ (20)

MINI MBA
All Courses

MARKETING STRATEGIES



195 Lessons ★★★★★ (20)

MINI MBA
All Courses


EMPLOYEE/HR STRATEGIES



146 Lessons ★★★★★ (20)

MINI MBA
All Courses


INNOVATION STRATEGIES



120 Lessons ★★★★★ (20)

MINI MBA
All Courses

SUCCESSION & EXIT PLANNING STRATEGIES



41 Lessons ★★★★★ (20)

MINI MBA
All Courses


PROFIT STRATEGIES



155 Lessons ★★★★★ (20)

MINI MBA
All Courses

RISK MANAGEMENT STRATEGIES



46 Lessons ★★★★★ (20)

MINI MBA
All Courses

SALES STRATEGIES



117 Lessons ★★★★★ (20)

ACCESS OUR MEMBERS COMMUNITY PAGE

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



The screenshot shows the Institute of Advisors community page. On the left is a navigation menu 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 the 'Institute Community' header with a '+146' member count. A text input field with a green 'IE' icon and the placeholder 'What's on your mind?' is present. Underneath is an 'UPCOMING EVENTS' section with a 'CREATE EVENT +' button. An event card is displayed for 'INSTITUTE OF ADVISORS EVENT' on October 7, 8:30 AM GMT+11, titled 'How to build a \$1 million dollar consultancy business'. The bottom of the page shows the start of 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 BUSINESSTIPS, 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 IOAADMINS SEPTEMBER 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 IOAADMINS SEPTEMBER 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 IOAADMINS SEPTEMBER 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 IOADMIN 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 IOADMIN MARCH 20, 2020

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



REBECCA DEAN

BY IOADMIN 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 IOADMIN 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 IOADMIN AUGUST 18, 2022

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



JOE WOODARD

BY IOADMIN 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 IOADMIN 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 IOADMIN 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 IOADMIN 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 IOADMIN MARCH 20, 2020

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

