

# THE VALUE CREATION MODEL

*Turning Insight into Impact*



Value is created when you combine **deep understanding, strategic thinking,** and **effective execution** to deliver results that matter.



## 1. UNDERSTAND (Insight)

Gain a deep understanding of the client's business, challenges, and goals.

### Key Actions

- Listen actively
- Ask better questions
- Analyze context
- Identify what matters most



## 2. THINK STRATEGICALLY (Direction)

Develop strategic perspectives and recommendations that address root causes and create opportunities.

### Key Actions

- Connect the dots
- Evaluate options
- Anticipate future impact
- Recommend the best path forward



## 3. COORDINATE EFFECTIVELY (Execution)

Assemble the right resources and manage execution to ensure plans become results.

### Key Actions

- Align the right expertise
- Manage timelines
- Communicate clearly
- Remove roadblocks



## 4. DELIVER RESULTS (Impact)

Execute with excellence to deliver measurable outcomes and drive client success.

### Key Actions

- Monitor progress
- Ensure quality
- Stay accountable
- Adapt as needed



## 5. CREATE LASTING VALUE (Outcome)

Generate sustainable value that strengthens relationships and drives long-term growth.

### Key Outcomes

- Measurable results
- Stronger performance
- Greater confidence
- Long-term partnership



When these competencies come together, advisors deliver **greater value, stronger results,** and **lasting impact.**



A **powerful** combination.  
A **measurable** difference.