

THE COMMERCIAL BANKING PARTNERSHIP PROGRAM

A Strategy to Engage & Develop Referrals from Commercial Bankers

Bank-based Private Wealth teams have a significant, untapped opportunity to develop stronger engagement with their commercial banking partners. The Commercial Banking Partnership Program is designed to equip Private Wealth Advisors with a comprehensive **STRATEGY** to seize this opportunity, increase lead flow and simultaneously enhance Commercial Banker value and credibility with their clients.

Knowledge Benchmarking



Ensuring Advanced Advisor Expertise



DEVELOPING ADVANCED EXPERTISE

Assessment & Benchmarking of advisor's knowledge and confidence in their knowledge, centered on wealth planning for business owners.

Comprehensive, advanced curriculum focused on ensuring requisite knowledge to effectively engage with business owners. Courses include:

- Business Valuation
- Business Continuation Planning
- Business Succession Planning
- Executive Compensation Strategies
- Employee Benefit Plans and Fringe Benefit Plans

EQUIPPING ADVISORS TO ENGAGE

Online video-based module and resources to equip advisors with a framework leveraging advanced expertise to engage business owners in a differentiated experience and positioning the advisor as the “go-to” resource for Commercial Banking clients.

Developing Conversational Proficiency



Resources to Support Execution

Developing the Commercial Partnership



Commercial Banker Education Presentation

Configurable presentation advisors can leverage to educate and inspire commercial partners on the wealth management needs that business clients face and the Client Experience that will be delivered to each referral the Banker makes.



Best Practices Webinar

One-hour advisor webinar to socialize/share Best Practices in the development of advisors' approach to engaging commercial partners.

Establishing Market Credibility



Commercial Partner Seminar

30-45 minute seminar that can be used by advisors, in partnership with their commercial bankers, to deliver to business owners in the local community to educate, develop leads and enhance organizational marketplace credibility.



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