Webinar Series

Total Client Engagement

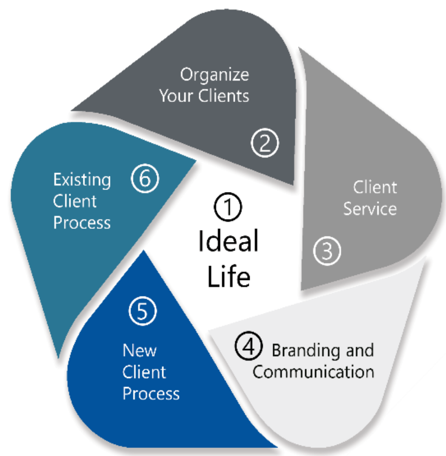
A FIRST TRUST & PARETO SYSTEMS COLLABORATION*

To unlock your full potential when it comes to consistent client acquisition and sustainable client retention, join Sherri Palle and Terry Gronbeck-Jones, esteemed Pareto Business Consultants, in this dynamic six-part webinar series.

TCE Series kicks off Tuesday, February 10th, 2026

Supported by Pareto Academy, you will embark on an actionable and proven process that empowers you to:

- Generate consistent & predictable growth
- Elevate the Client Experience to New Heights
- Streamline Efficiency with Systems & Processes



WEBINAR SERIES

Session #1: Gain Clarity on Your Business
Session #2: Organize Your Clients
Session #3: Refine Your Service Model
Session #4: Enhance Your Branding & Communication
Session #5: Fast-Track New Clients to Advocacy
Session #6: Reframe Existing Client Relationships

HOSTED BY

Sherri Palle
Pareto Business Consultant

Terry Gronbeck-Jones
Pareto Business Consultant

DURATION AND TIME COMMITMENT

Six-month series and approximately 2-3 hours per week for program study and implementation. Sessions are approximately one month apart.

**Speak to your First Trust wholesaler to register*

TCE Webinar Series

Schedule & Sessions

Session #1, Tues. Feb. 10th, 11am PT/1pm CT: Gain Clarity on Your Business

Determine what it is you actually want to achieve in life, both professionally and personally, rooted in the belief that you deserve to achieve both liberation and order in a meaningful way. Our process is revealing and will add clarity and intention to your life, which will make future decision-making easier.

Session #2, Tues. Feb. 24th, 11am PT/1pm CT: Organize Your Clients

Create a client classification framework based on assets, attitude and advocacy that will effectively sort and organize your new and existing clients in a meaningful way. This client classification process is the first step in ensuring you and your team focus on the 20% of your clients who generate 80% of your revenue – thereby increasing your chances of attracting more just like them.

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Session #3, Tues. March 10th, 11am PT/1pm CT: Refine Your Service Model

Ensure you and your team deliver ongoing client service with the highest degree of consistency and predictability. Consistency is a fundamental element of trust and overall client satisfaction. Your Advocate Service Matrix will ensure your best clients receive the time and attention they deserve.

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Session #4, Tues. March 24th, 11am PT/1pm CT: Enhance Your Branding & Communication

This session will ensure you are perceived and described as a consultant with a process, rather than as a salesperson trying to close sales. It's not what you say, it's what they hear that matters.
Talk in terms of your ideal client; who you work with, what they want to achieve and how you get them there – and have that message consistent across your entire business.

Session #5, Tues. April 14th, 11am PT/1pm CT: Fast-Track New Clients to Advocacy

Refine, develop and deliver a process for onboarding new clients. This process will ensure consistency for every client you bring on, which is an important aspect of your future referability.

Session #6, Tues. April 28th, 11am PT/1pm CT: Reframe Existing Client Relationships

Refine, develop and deliver a process for reframing with existing clients. This highly structured, client-focused approach will ensure that all of your existing clients are working with you in the true spirit of partnership.

All webinars are recorded and made available following the live broadcast