Pareto RIA & Enterprise Solutions

Uncover the offerings available to strengthen your important relationships

paretosystems
Consistent. Results.

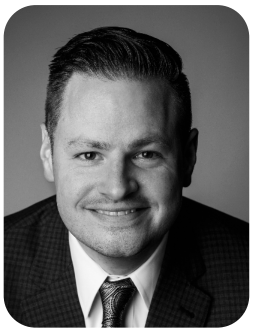
SPEAKING

Our Presenters

DUNCAN MACPHERSON, Pareto CEO

Duncan's primary goal is to help Professionals achieve liberation and order in their businesses through step-by-step methodology and execution. Duncan is also an industry best-selling author and has written many books including The Advisor Playbook and The Blue Square Method.

Topics: Harnessing AI for Growth, The Strategic Growth Blueprint, The Mulitplier Method, Scaling Up Through Succession



MIKE CAJTHAML, Pareto Speaker

Mike's primary goal is to help Professionals achieve liberation and order in their business. Uncover the factors that shape the strength of your client relationships. By identifying key gaps and opportunities, you can refine your approach to increase engagement, attract quality referrals, and build a business positioned for growth.

Topics: Revealing Exercises to Unlock Client Loyalty, Advocacy, & Growth

JASON WESTOVER, Pareto Speaker

Jason Westover has dedicated his career to empowering advisors, sales teams, and wholesalers across the industry's most prominent companies. As a sought-after speaker and educator, Jason has influenced thousands of financial advisors and wealth managers through his curiosity, strategic problem-solving, and talent for uncovering unique opportunities.

Topics: Harnessing the Power of AI, Total Client Engagement

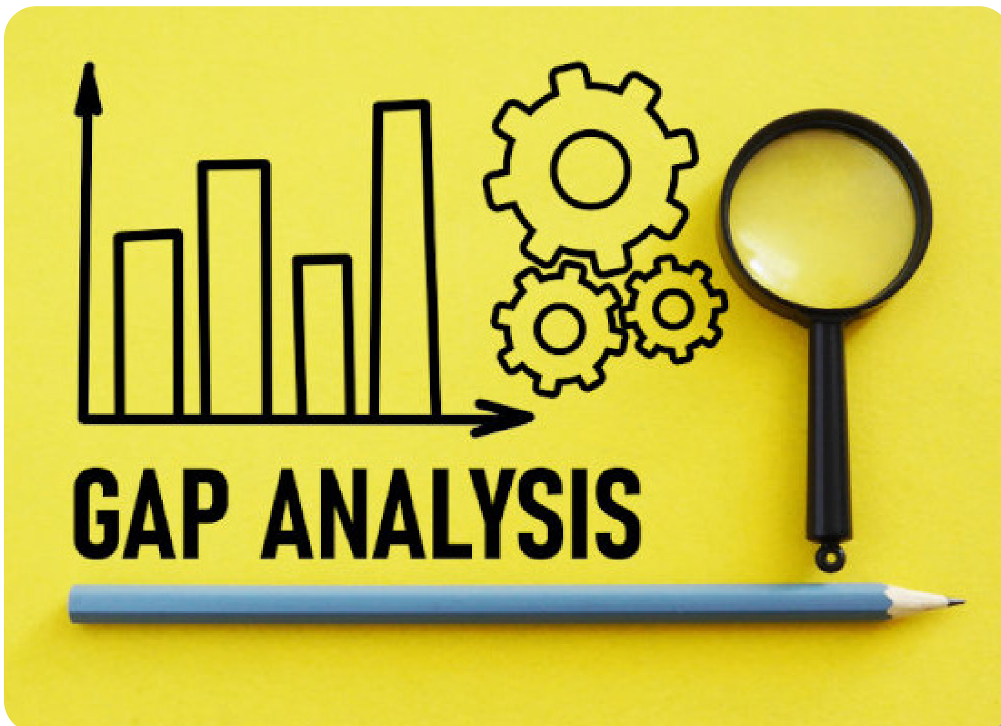
DR KAREN WEISGERBER, Pareto Speaker

Dr. Karen Weisgerber engages individuals, couples, and families around the issues that present themselves with significant resources, as well as concerns that arise with the distribution of wealth among siblings and across generations. She also provides her expertise to financial and legal professionals seeking to deepen the services they offer through speaking engagements, workshops, and other industry events.

Topics: The Legacy Plan, The Multi-Generational Plan

ENTERPRISE GAP ANALYSIS

This engagement brings firm leadership together with the Pareto Systems team to evaluate current practice management capabilities. The focus is on identifying gaps across systems, processes, client experience, and advisor growth strategy, providing a clear, structured view of where improvements can be made.



The outcome is a defined benchmark and a prioritized, actionable roadmap. This equips firms to strengthen advisor performance, implement more effective operating systems, and build a more scalable, enterprise-ready business.

CUSTOM WEBINARS

Pareto delivers customized webinars designed to equip advisors with proven strategies. Each session focuses on a specific aspect of practice management and is supported with actionable resources to support implementation.

Topics can focus in all areas of an advisors life cycle from growing, teaming, scaling and exiting.

Some recent webinar topics include:

- Articulating Your Value
- Generating Introductions
- Elevating The Client Experience
- Fast-Tracking New Client to Advocacy
- Reframing Existing Client Relationships
- Building Strategic Partner Relationships
- Intergenerational Planning
- Harnessing the Power Of AI
- Strategic Planning
- Driving Enterprise Value

RIA AFFINITY PROGRAM

Pareto engages with the leadership of RIAs and Broker Dealers to deliver structured best practices advisors can implement quickly, helping them to elevate the client experience, improve systems and processes, and build more scalable, valuable businesses.

Pareto's Affinity Program includes:

- Leadership Consultation
- Custom Webinars Series
- Workshops & Masterminds

VIRTUAL PRACTICE MANAGEMENT TEAM

Pareto provides the expertise and scale of an experienced financial advisor coaching firm without the complexity and time of enhancing or building an internal practice management team.

Through structured programs and implementation resources, your internal consultants, or managers can ensure advisors gain access to proven strategies that strengthen client relationships, improve systems and processes, and drive sustainable growth.

Pareto's Practice Management Team includes:

- Small Group Coaching
- Train the Trainer Certification
- Program Licensing

For more information, contact your First Trust Wholesaler