

## ACA Success Program

Our training program allows you to learn the ACA System™ at your own pace and work with clients while you learn.

It prepares new and established financial advisors for success using many modalities, including:

Self Study

Virtual Classroom

Group Instruction

Coaching & Mentoring

Visiting Advisor Program

Continuing Education



## BUILD A PRACTICE THAT IS FULFILLING AND SUCCESSFUL.

If you are ready for a more meaningful professional experience, make the transition to the business you've always wanted with ACA's philosophical framework, community support and ongoing education.

### [acaplanners.org](http://acaplanners.org)

Visit our website to learn more about ACA and how we can help you build your ideal practice.



PO Box 844  
Highland, MI 48357

Phone: 888.834.6333  
E-mail: [info@acaplanners.org](mailto:info@acaplanners.org)  
[www.acaplanners.org](http://www.acaplanners.org)

## Ready to do business on your terms?



## ACA is here to help.

SYSTEMS · TRAINING  
COMMUNITY ·  
ETHICS



## Do You Share Our Priorities?

- Put the client's best interests first.
- Avoid wasting time or money reinventing the wheel.
- Have a successful practice *and* a successful life.
- Contribute to a community where others benefit from your knowledge and experience.

If you're ready for a rewarding, client-centered practice that allows you to live out your priorities, then you may be ready for ACA.

### Systems & Training

***Implement a proven business model.***

ACA members receive comprehensive training in the ACA System™, the proven business model for growing a profitable holistic planning practice.

- Learn according to your style and schedule
- Focus on practical application
- Access the Success Program Concierge for all questions
- Build on what you already know
- Grow your practice while you learn the ACA System™
- Receive ongoing education once your training is complete

### Community

***Benefit from the collective knowledge of more than 160 virtual partners.***

ACA members are in business for themselves, but they are not in business by themselves. Their shared philosophy and similar practice styles lead to high levels of communication and sharing:

- Members from a variety of professional backgrounds who answer questions, brainstorm, and provide encouragement and guidance
- Active Discussion Forum
- File libraries
- Special interest, study, and practice management groups
- Annual Conference

### Tools & Support

***Get your practice operational and profitable faster.***

ACA members have access to a variety of tools and support to help them implement the ACA System™:

- Excel-based calculators and analyzers for client appointments
- Word templates for forms and handouts
- Model compliance documents and consultation with compliance attorneys
- Turnkey marketing collateral packages with professional marketing coaching
- Visiting Advisor Program lets you see how other members implement the ACA System™
- ACA mentor works with you through your first client appointments

### Holistic Financial Planning

***Operate a fulfilling, ethical, client-centered practice.***

ACA members practice on a pure fee-only basis and provide true holistic planning services that integrate all aspects of a client's financial situation. They put their clients' goals, values, and best interests first and understand the value of implementing a proven business model in their practice.

**ACA is the only fee-only financial planning community focused on the holistic planning strategies that create true wealth for advisors and their clients.**

