



Mindset Mastery is designed specifically for an exceptional and exclusive group of successful women in wealth to rejuvenate themselves, their team, and their clients through intentional connection with other wise, supportive, experienced, and inspiring women.

A PROGRAM WITH PURPOSE

This exclusive Forum of 8-12 Successful Women in Wealth want to:

- Share Experiences
- Make Connections
- Find Solutions

This program is designed to define your vision, coordinate your team, integrate technology, elevate your brand, and rejuvenate all aspects of your advisory practice. It will also keep you on the path of systematizing & growing your advisory practice in a meaningful and manageable way, while maximizing the value of your life's work.

This program will help you live your best personal & professional life. This shift is real.

Sidebar: By participating in this program, you will be elevating women around you and making the world a better place. Exhale here.

JOIN A SUPPORTIVE COMMUNITY OF ACHIEVING EXCELLENCE

The engagement for this exclusive program is as follows:

- **JANUARY Meet & Greet** - *Let's get to know each other*
- **FEBRUARY to MAY** - *Connecting - Sharing – Elevating*
 - **Week 1 Community Learning** - Live & energizing virtual forum on a specific topic
 - **Week 2 Community Learning** - Live & energizing virtual forum on a specific topic
 - **Week 3 Roundtable Discussions** - Defined Break Out Groups for In-depth discussions
 - **Week 4 Mindset Mastery** – Group sharing of learning & key take-aways for the month
- **JUNE WIND UP** - Wrap Up Forum to share and discuss wins & challenges, along with ensuring everyone is on track and fully inspired for the rest of 2025!



OUR PROMISE TO YOU

A special program requires special attention and we want this to be one of the best business decisions you've ever made. This is an overview of what to expect:

- Inspiring Welcome & Rejuvenation Package!
- Access the Mastery Online Dashboard with amazing resources to elevate your practice
- Participation in 8 live and engaging Community Learning Sessions
- Invitations to join 4 of our Mastermind Mini-Groups (small group breakouts)
- Participation in 4 monthly Mindset Mastermind Forums & "The Ultimate Session" in June
- Detailed follow ups with Action Items, Tips & Helpful resources after each session
- Recommended Podcasts, Books & Must-Watch Videos!
- Ability to remain connected with this Mindset Mastery Group beyond the program completion
- Earn 6 IAR CE Credits upon successful completion



PROGRAM REGISTRATION FEE

The Mindset Mastery Program Fee is \$7,500.

This includes participation of up to 3 leadership individuals on the advisory team including:

- Senior or Partner Advisors
- CEO's
- COOs or Business Managers

GET CONNECTED

If you would like to know more about this program or would like to join, please feel free to contact us at assist@mindsetconsulting.ca.

Program Registration closes on **December 31, 2024** or sooner if available spaces are taken.

Program Payment can be processed before December 31, 2024 if preferred or in the New Year as a one-time lump sum payment or \$1250/month for six months.



YOUR FORUM FACILITATORS: Experts in Collaboration

Sherri Palle and Marci Fried are passionate about your success. They will provide concepts, elite coaching themes & ideas as well as, steer conversations, maximize engagement, connect insights, and ensure meaningful, productive interactions in every session. The result is a dynamic community approach which goes way beyond traditional development. This program will empower participants to align with their goals & purpose, delegate to others, elevate their approach and reach new heights

SHERRI PALLE

Experience, Wisdom & Credentials

- 19 years coaching to elite teams around North America
- 9 years direct experience in the financial services industry
Past Industry Credentials – CSC, CPH & PFP Professional Financial Planner
- Individual Coach to Advisors & Teams as a Trusted, Experienced Confident
- Group Coach Speaker, Facilitator, Mentor & Project Manager
- Facilitator of Strategic Planning Sessions & Professional Workshops
- MBA (HR & Entrepreneurship) University of Victoria
- B. Comm (Marketing) Mount Allison University
- Certified Professional Consultant on Aging (CPCA®)
- Pareto Certified Coach & Certification in Life Coaching
- Certification in Mindfulness and Reiki Mastery
- Over 10 years as a successful entrepreneur of Mindset Consulting



Mindset Consulting
Senior Consultant
Coach & Trainer
Speaker

MARCI FRIED

Experience, Wisdom & Credentials

- 15 years of consulting & coaching experience to exceptional teams around North America
- Diverse roles in financial services including a Financial Advisor and a Wealth Management Managing Director for a Fortune 500 firm
- Over two decades of successfully running her own business
- Entrepreneur & Strategic Leadership Advisor
- Scaling Up Master Certification
- Pareto Certified Senior Business Advisor
- Team Building Strategist
- Acquisitions & Organic Growth Specialist
- Professional Speaker
- Mindset Mastery
- Professional Business Development Consulting



Starts with Alignment
Senior Consultant
Coach & Trainer
Speaker



PROGRAM SCHEDULE

We are delighted to share our program schedule of events offering a variety of ideas, concepts, learning and sharing opportunities.

JANUARY		Get Started!
Tuesday, Jan 28	Meet & Greet with Facilitators & Program Participants Full Program Overview & Orientation	
FEBRUARY		Find Your True North
Tuesday, Feb 4	Community Learning: Living Your Best Life	
Tuesday, Feb 11	Community Learning: Achieve Balance with Boundaries	
Tuesday, Feb 18	Mastermind Mini-Group - Detailed Discussions with Your Peer Group	
Tuesday, Feb 25	Mastermind Forum - Sharing Ideas, Wisdom & Experience	
MARCH		Set Your GPS
Tuesday, Mar 4	Community Learning: Create Your Dream Practice	
Tuesday, Mar 11	Community Learning: What's Your Critical Number	
Tuesday, Mar 18	Mastermind Mini-Group - Detailed Discussions with Your Peer Group	
Tuesday, Mar 25	Mastermind Forum - Sharing Ideas, Wisdom & Experience	
APRIL		Inspire Your Team
Tuesday, April 1	Community Learning: Your Advisory Blueprint	
Tuesday, April 8	Community Learning: The Rhythm of Your Business	
Tuesday, April 15	Mastermind Mini-Group - Detailed Discussions with Your Peer Group	
Tuesday, April 22	Mastermind Forum - Sharing Ideas, Wisdom & Experience	
MAY		Start Your Journey
Tuesday, May 6	Community Learning: Elevate Your Client Experience	
Tuesday, May 13	Community Learning: Next Level Branding	
Tuesday, May 20	Mastermind Mini-Group - Detailed Discussions with Your Peer Group	
Tuesday, May 27	Mastermind Forum - Sharing Ideas, Wisdom & Experience	
JUNE		Pack Your Bags
Tuesday, June 10	Final Mastermind Forum - Taking Implementation to the Next Level	