



# Russell Academy

Structure your business for success



FOR FINANCIAL ADVISERS ONLY

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# Working together to achieve what matters

Clients' goals are at the heart of every good financial advice business.

But to deliver the best advice to your clients, you need to make sure that your business is structured for success. You need flexible strategies to service clients. You need an environment where all staff share the same vision. You need to make your top clients want to recommend you to their friends.

That's why we've established Russell Academy.

Russell Academy brings together our experience helping thousands of advisers – in the UK and abroad – to build the businesses they want. It's a flexible, modular structure so that we can work together to design a programme tailored for your business.

For the elite advisers who meet our admission criteria, studying with Russell Academy will help build a sustainable business that delivers results for you, for your staff and most importantly, for your clients.

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# Designing the course around you

We know it's not easy to make time to focus on your business strategy. Clients are demanding. Markets move. Regulations change. You're busy, and time away from your clients needs to be well spent.

Russell Academy is made up of core modules plus elective choices so that you can pick the courses that will bring you the most benefit. We've grouped them into three levels: plan, build and expand. We'll work with you to develop a study programme that is right for you.

Each subject is covered in an easy-to-manage module lasting two to three hours. You can choose to study one module at a time, combine several into a day-long programme, or build a tailored course over a longer period of time. Location is flexible too – courses can be run from your office, from an agreed venue or from Russell's office in central London. And if you need advice between classes, just contact us. Our team is always here to help.

All Russell Academy modules are CPD certified.



## Plan

Designed for advisers looking to take the next step to improve their businesses, these courses provide useful tools to understand your business today and identify a plan for improvement.



## Build

Courses at this level build on what you've learnt from the planning analysis to give you the strategies you need to run a more efficient business.



## Expand

These courses are designed to help you win more top clients and grow your business profitably.

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# The curriculum

The curriculum for Russell Academy is divided into tiered modules of two to three hours each. We'll work together with you to design a programme that's right for your business.

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## PLAN



### Vision and purpose

Having a vision for your business will give you management clarity, unite your team and help you articulate your value to clients.

### Business planning

This module is designed to develop a simple business plan concentrating on specific strategies and tactics to help your business thrive.

### Client analysis

Segmenting your client book will help you define the service levels you can provide and make decisions to improve your business.

### Building a marketing plan

Leading advisers create and deliver consistent messages about who they are, what they do for clients and what differentiates their business.

### Review your service proposition

This focuses on analysis of your current service proposition and is designed to highlight improvements that can be made.

### Investment proposition

This covers how to put together a robust due diligence process for your chosen investment solution.

### Focused client reviews

The cornerstone of a wealth management service that generates referrals is providing regular reviews that demonstrate the excellent work you're doing on your clients' behalf.

### Understanding investment risks

In this module, we'll look at portfolio risk and understanding the implications for your clients.

### Investor psychology

Many clients are their own worst enemy when it comes to investing. Here we look at investor psychology to analyse the reason behind their behaviour.

# BUILD



## Scalable strategies

Servicing smaller clients can take up a disproportionate amount of your time. In this module we look at how to implement a scalable, one-to-many solution to service these clients efficiently.

## Client migration and disengagement strategies

Many advisers have clients that would benefit from a fuller wealth management relationship as well as those who are not actively engaged with their adviser. Developing a strategy to migrate or disengage client relationships is one way to make your business more profitable.

## Asset allocation and portfolio construction

This module covers the principles of portfolio construction and asset allocation to help you build the right solutions for your clients.

## Building the team

Part psychology and part business management, this module will help you motivate and unite your team around a common goal.

## Demonstrating value

Price is what clients pay, but value is what they get. This module looks at the most effective ways to demonstrate the value of the service you provide to your clients.

## Client centric communications

Clients and prospects need clear communications they can understand. This module looks at how to tell your story and talk to clients in their language.

## Strategic persuasion

Build trust and influence in your business community by applying the principles of persuasion.

# EXPAND



## Target markets and referrals

Identify your target market then add more of the right type of client to your book using proven methods of referral gathering.

## Centres of influence

Getting a strong roster of solicitors, accountants, asset managers and platforms can help you service your existing clients as well as generate referrals.

## Promoting your business culture

Get the best work from your team and enhance your community standing by building and promoting a winning business culture.

## Global best practice

Russell Investments has been working with advisers for decades. This session looks at best practice examples and how you can apply the same principles to your business.

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# Graduate from Russell Academy

An elite number of advisers will complete the required syllabus to become a Russell Academy Graduate. Complete the following modules from the syllabus to graduate. This prestigious qualification demonstrates a high level of achievement, commitment and expertise.

## FOUNDATION:

### PLAN

- Vision and purpose
- Business planning
- Client analysis

## GRADUATION:

### BUILD

- Scalable strategies
- Client migration and disengagement strategies
- Demonstrating value
- Client centric communications

### EXPAND

- Target markets and referrals
- Promoting your business culture

### ELECTIVE

Four additional modules of your choice.

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# The application process

## Who should apply?

Russell Academy will consider individual applicants as well as business teams. It's a challenging programme, and candidates must be committed to building a strong business designed to meet their clients' needs.

## How to apply

Admissions will be considered on a case-by-case basis.

**Contact your regional director,**  
**call the team on +44 (0) 20 7024 6601 or**  
**email [ukadviser.support@russell.com](mailto:ukadviser.support@russell.com) to find out more.**



For more information please visit  
[www.helpingadvisers.co.uk](http://www.helpingadvisers.co.uk).

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**IMPORTANT INFORMATION**

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UKR-2014-07-09-0195  
0986-SEP-2015

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