



COMPASS
2023
CALENDAR

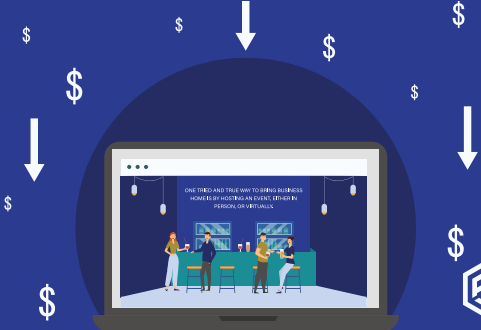
ONE TRIED AND TRUE WAY TO BRING BUSINESS HOME IS BY HOSTING AN EVENT, EITHER IN PERSON, OR VIRTUALLY.



INVITE SOME OF YOUR BEST EXISTING CUSTOMERS AND ENCOURAGE THEM TO BRING THEIR FRIENDS.



HOLDING A VIRTUAL EVENT IS USUALLY LESS EXPENSIVE TO PUT ON AND IS MORE FLEXIBLE FOR YOUR ATTENDEES.



January 2023

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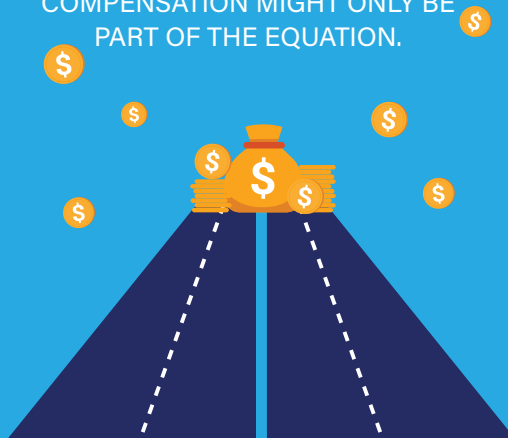
REGULARLY KEEP TABS ON YOUR SOURCES OF REFERRALS.



ASK THEM HOW THEY'RE DOING AND DISCUSS HOW YOU CAN TAKE ADVANTAGE OF RELEVANT OPPORTUNITIES TO SEND WORK BETTER TOGETHER.



REMEMBER THAT IT IS A TWO-WAY RELATIONSHIP, AND MONETARY COMPENSATION MIGHT ONLY BE PART OF THE EQUATION.



February 2023

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DID YOU HAVE ANY SPEAKING ENGAGEMENTS IN THE PAST YEAR?



HAVE YOU ADDED ANY EXPERIENCES OR ADDED SERVICES WITHIN THE PAST YEAR?



IF YES, THEN CONSIDER UPDATING YOUR WEBSITE BIO.



KEEPING YOUR BIO FRESH WILL HELP YOU ATTRACT NEW CLIENTS, AND WILL HELP YOU AVOID THE RISK OF LEAVING RELEVANT ITEMS OUT.



COMPASS
CFD Solutions, LLC

March 2023

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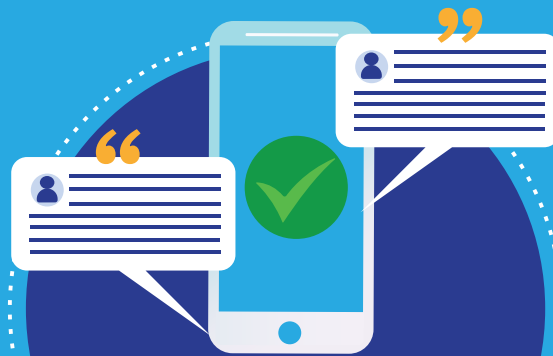
CONSIDER FOLLOWING YOUR REFERRAL SOURCES, CURRENT CLIENTS, AND PROSPECTS ON SOCIAL MEDIA.



WHEN YOU SHARE CONTENT, CONSIDER TAGGING YOUR CONTACT TO BOOST THEIR VISIBILITY AND GRAB THEIR ATTENTION.



THEN ADD A COMMENT OF YOUR OWN REFLECTING THE SERVICE THAT YOU'RE OFFERING.



April 2023

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BESIDES ITS NETWORKING BENEFITS,
 VIRTUAL EVENTS CAN INCREASE VISIBILITY AND SHOWCASE
 THOUGHT LEADERSHIP FOR YOU AND YOUR FIRM.



May 2023

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BE CONSISTENT IN YOUR APPROACH
TO MANAGING YOUR EMPLOYEES.

BE SURE TO REWARD THE SAME
BEHAVIORS EVERY TIME
THEY APPEAR.

AND DISCOURAGE THE SAME
BEHAVIORS WHEN
THEY OCCUR.



June 2023

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STRIVE FOR CLARITY, THOROUGHNESS,
AND ACCURACY IN COMMUNICATING
WITH YOUR EMPLOYEES.

HOW YOU COMMUNICATE WITH YOUR
TEAM VERY OFTEN DETERMINES
YOUR EVENTUAL SUCCESS.



July 2023

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THE WAY YOU TREAT YOUR COMPANY'S OWN TEAM MEMBERS REFLECTS UPON YOU AND YOUR COMPANY'S VALUES.



YOUR PEOPLE ARE YOUR COMPANY'S ASSET. YOU WOULD INVEST IN OTHER ASSETS AND YOUR TEAM SHOULD BE NO DIFFERENT.



August 2023

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AS THE MARKETS BECOME MORE UNPREDICTABLE, CLIENTS VALUE THE ADVICE OF RIAs EVEN THE MORE.



WITH RISING TIDES, INDIVIDUALS MAY FIND IT EASY TO INVEST ON THEIR OWN.



BUT IN UNCERTAIN TIMES, THE VALUE OF YOUR EXPERIENCE WILL INCREASE GREATLY.



POSITION YOURSELF TO TAKE ADVANTAGE OF THAT FACT.



September 2023

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BE CLEAR ON YOUR TARGET CLIENT PROFILE AND MAKE SURE THAT YOUR TEAM UNDERSTANDS YOUR CLIENTS AND PROSPECTS.

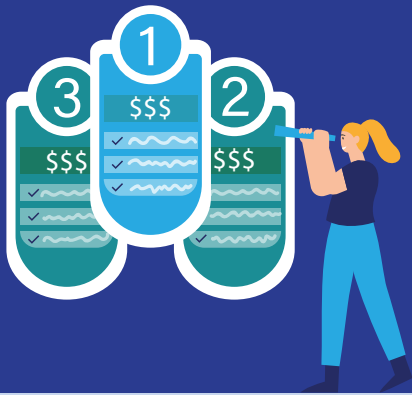
THIS WILL FURTHER DEFINE THE VISION FOR YOUR COMPANY AND HELP AID LONG TERM PLANNING.



October 2023

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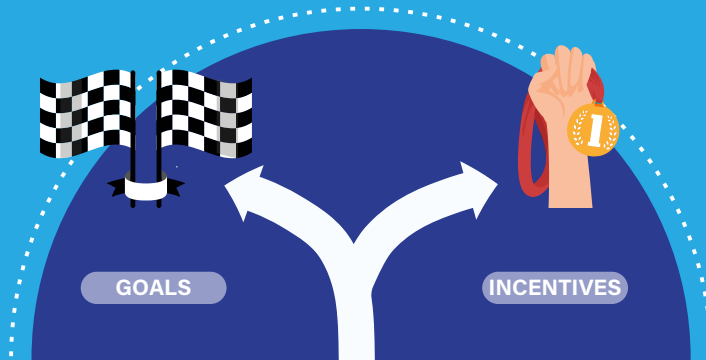
ENSURE THAT COMPENSATION PLANS FOR YOUR TEAM ARE FULLY TRANSPARENT.



AVOID IMPLEMENTING A REWARD SYSTEM THAT IS SUBJECTIVE OR OVERLY COMPLICATED.



IF OVERLY COMPLICATED, YOU RUN THE RISK OF THE EMPLOYEE'S INCENTIVES NOT BEING FULLY ALIGNED WITH THE GOALS OF THE FIRM.



November 2023

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GROW A "FARM TEAM"
OF TALENT THROUGH
NETWORKING.



ALWAYS HAVE AN EYE FOR
TALENTED ADDITIONS
TO YOUR FIRM.



December 2023

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COMPASS

RIA SERVICES