

PRESS RELEASE

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New Learning System From The Oechsli Institute Helps Mutual Fund Wholesalers Re-Build Credibility With Financial Advisors and High Net Worth Investors

GREENSBORO, NC - November 20, 2003 /Send2Press Newswire/ -- The Oechsli Institute ([www.oechsli.com](http://www.oechsli.com)) announces the publication of "Becoming a 21st Century Value Added Wholesaler," a learning system by Matt Oechsli which focuses on 14 criteria identified in an independent research study of financial advisors as most important in establishing a "preferred" relationship with mutual fund wholesalers.

While Mutual Fund industry is being criticized for the actions of a few, a large number of wholesalers are working hard to assist financial advisors in their efforts to attract and service high net worth clients.

Despite that effort, a 2002-2003 Oechsli Institute independent study of over 1,000 financial advisors showed that the performance of their mutual fund wholesalers was not meeting the financial advisor's expectations in all 14 areas they identified as important to that relationship.

"Becoming a 21st Century Value Added Wholesaler" is a complete business builder system, built on the 14 criteria that Mutual Fund wholesaler's clients said they value most. The goal is to help the wholesaler establish a long-term preferred relationship, based on two principles:

1. Their understanding of the Financial Advisor's client base, business goals, development strategies, and how they position mutual funds to attract, service, and retain targeted clients.
2. How effectively they add value to the relationship by applying the 14 criteria uncovered in the Oechsli Institute research.

The system begins with self-assessment and goal-setting, based on the 14 criteria. The 9 business building activities that follow include ...

- Profiling the net profit contribution potential of their top clients.
- Establishing an ideal client profile.
- Following a unique prime time principle to manage their territory.
- Using a Branch Score Card system to focus their efforts.
- Balancing efforts to upgrade clients with attracting new clients.
- Using a weekly metrics scorecard to monitor progress.
- Using value-added impact points to connect with prospects.
- Utilizing research based best practices to expand their value.

"Becoming a 21st Century Value Added Wholesaler" is available as a self-contained, multi-media supported learning system for US \$245.00. Public seminars based on this program are planned for the second quarter of 2004.

For more information, or to place an order, visit <http://www.oechsli.com> or call 800-883-6582.

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