

B | I | R | D

BUILD • INNOVATE • REIMAGINE • DELEGATE

BIRD TBC

THE BIRD BUSINESS CLARITY PROGRAM

TWELVE MODULES. COMPLETE CLARITY.

Every SA.A.SS concept, recorded to take at your own pace: the clarity, systems and strategies to build a practice that works beyond you.

4 WEEKS • 12 MODULES • 4 MASTER CLASSES • 6 MONTHS' ACCESS

WHERE TBC SITS

LEARN IT. DESIGN IT. BUILD IT.

TBC is the first step. It **explains every concept in SA.A.SS**, so that everything after it, at TBT and TBS, is built on understanding.

TBC

UNDERSTAND SA.A.SS

Every concept, explained.
Twelve recorded modules.

YOU ARE HERE

TBT

DESIGN YOUR BLUEPRINT

Three days applying the
concepts to your own
business numbers.

TBS

IMPLEMENT, GUIDED

Start the implementation
journey, with guidance.



*Most MFDs build **income**.*
*Very few build **enterprise value**.*

TBC helps you move from working in the business to building a business that works beyond you.

SUCCESSFUL ON THE OUTSIDE. EXHAUSTED ON THE INSIDE.

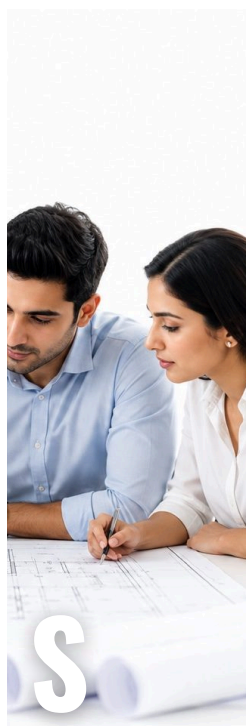


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- i* No time to enjoy the wealth you've created.
-
- ii* Clients treat you like an RM, not the expert you are.
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- iii* Technology exists, but you're not using it well.
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- iv* Nothing institutional to be proud of.
-
- v* If you stop, there's no guarantee of income.
-
- vi* Not sure your children will want to take it forward.
-
- vii* Not feeling the joy of evolving.
-
- viii* Still running after clients.
-
- ix* Working harder than the business itself.
-

*If three of these sound familiar,
the answer is **clarity**, not more hours.*

FIVE PILLARS TO BUILD A BUSINESS THAT THRIVES.

TBC teaches each pillar from the ground up: what it means, why it matters, and how it changes the way the practice runs.



S

SCALE UP

The vision, positioning, clients and growth direction of your business.



A

ACCELERATE

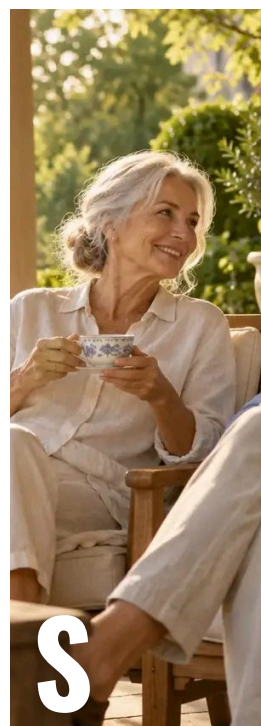
The structure, team, systems and execution capability that scale needs.



A

AUTOMATE

Less founder dependency, through workflows, technology, tracking and automation.



S

SUSTENANCE

Retention, governance, culture and long-term stability.



S

SUCCESSION

Valuation, transferability and continuity beyond the founder.

5

pillars of SA.A.SS

12

recorded modules, 12 to 14 hours

L1 → L6

a structured path for growth

TWELVE MODULES. THE WHOLE SYSTEM, EXPLAINED.

From your vision and values to clients, concepts and the systems that win and keep them.



01

VISION, MISSION & PLAN

- Magic numbers: AUM, SIP, 10X growth
- The transformational advisor mindset
- Your mission and purpose: your IKIGAI



02

VALUES, PRINCIPLES & CULTURE

- Core values and code of honour
- Your leadership identity
- Culture: the invisible operating system



03

CLIENTS, PRODUCTS & OFFERINGS

- S.O.M.A.N.I.A., P.A.I.N and A.B.C.D
- Unique offerings and blueprints
- Product menu and positioning



04

CONCEPTS, STORIES & STRATEGIES

- LTSM strategies
- Seven Events to Financial Freedom
- HNI strategies



05

CLIENT ONBOARDING & MANAGEMENT

- LMS: Lead Management System
- CMS: Client Management System
- RMS: Review Management System



06

TEAM BUILDING, PART 1

- Business capacity clarity
- Client handling and ideal team capacity
- TRS: Team Recruitment System

FROM THE TEAM TO THE NEXT LEVEL.

Team, tracking, brand, compliance, succession and valuation: the practice as an enterprise.



07

TEAM BUILDING, PART 2

- TIS: Team Induction System
- TDS: Team Development System
- TAS: Team Appraisal System



08

TRACKING & PERFORMANCE

- Daily job, business and service trackers
- MIS: Management Information System
- Weekly progress trackers



09

BRAND BUILDING & HNI

- A strong brand
- Market authority
- HNI strategies for scalable growth



10

DUE DILIGENCE & COMPLIANCE

- DDQS: the Due Diligence Management System



11

SUCCESSION & EXIT PLANNING

- Family succession
- Brand and professional team exit
- Merger, sub-broker model, sale for valuation



12

VALUATION & TRANSFORMATION

- BVMES: Business Valuation Multiplier & Evaluation System
- Clarity on your next level



PROGRAM HIGHLIGHTS

WHAT THE PROGRAM GIVES YOU

ONE CLEAR OBJECTIVE. ONE CLARITY JOURNEY.

OBJECTIVE

CLARITY, SYSTEMS, STRATEGY

The clarity, systems and strategies to build a scalable, sustainable business.

BUSINESS GROWTH

L1 TO L6

A structured path for consistent, profitable growth.

TIME FREEDOM

OWNER, NOT OPERATOR

From operator mindset to owner mindset, with predictable structures.

TEAM, SYSTEMS & PROCESSES

AN ORGANISATION THAT RUNS

Teams, roles and SOPs, with accountability built in.

RISK & SUSTENANCE

STABILITY THAT LASTS

Compliance, lower risk, stronger retention, long-term stability.

VALUATION & WEALTH

TRAIL INTO ENTERPRISE VALUE

A clear valuation and succession pathway.

FIVE SHIFTS YOU TAKE AWAY

CLARITY FIRST

Decide with confidence

SYSTEM DRIVEN

Repeatable by design

GROWTH FOCUSED

The right strategies

VALUE CREATION

Worth more than you

LEGACY READY

Impact for generations

WHO IS IT FOR

- 01**

Mutual Fund Distributors

Ready to scale sustainably.
- 02**

Financial Advisors

Building long-term enterprise value.
- 03**

Wealth Managers

Looking for systems, automation and growth.
- 04**

Practice Owners

Planning succession and scale.

THE BIRD BUSINESS CLARITY PROGRAM

INVEST TODAY. SCALE TOMORROW.

DURATION

4 WEEKS

Start to finish

RECORDED

12 MODULES

12–14 hours

LIVE

**4 MASTER
CLASSES**

For Q&A, flexible dates

ACCESS

6 MONTHS

From the day you enrol

WHAT YOU WILL GET

- ✓ Twelve recorded modules
- ✓ Frameworks and tools
- ✓ Action plans and direction
- ✓ A community of peers
- ✓ Four live master classes for Q&A
- ✓ Learning resources
- ✓ Strategic business clarity

ENROL FOR TBC

Four weeks to understand the whole system: twelve modules, and four live master classes where the community forms. Six months' access. Enrol on the page and begin.

nlebird.com/tbc



Skill to scale. Build to last.