



DTAYLOR  
GROUP

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STRATEGIC GROWTH CONSULTANTS

# ORGANIC GROWTH CONSULTING FOR WEALTH ADVISORS, INVESTMENT MANAGERS, AND OTHER PROFESSIONAL SERVICES FIRMS

*The Organic Growth Authority*



## ABOUT US

Organic growth is vital to the long-term sustainability and success of your firm. Our diverse experience helps you stay in front of the rapidly evolving business environment, guiding you in integrating processes and best practices in order to maximize your growth capabilities.

*"Drew quickly grasped our firm's most critical business development needs. His insights, based on his deep understanding of the advisory landscape and investment distribution, helped us develop a thoughtful business development plan to enhance our future organic growth."*

Dale Harvey - Founder and CEO, Poplar Forest Capital

[www.dtaylorgroup.com](http://www.dtaylorgroup.com)



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## SERVICES

We provide comprehensive, end-to-end consulting services and project management focused on organic growth, distribution, and executive leadership.

- Distribution Assessment & Planning
- Digital Distribution Strategy & Integration
- Client Retention
- Sales Process Development
- Leadership & Sales Coaching
- Outsourced Management Solutions

## WHO WE SERVE

- RIAs & Fee-based Advisors
- Investment Managers
- Real Estate & Mortgage Firms
- CPAs, Attorneys, & Other Service Professionals

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