PCM

PEAK CAPITAL MANAGEMENT

Helping You Get Where You Intend to Go, Faster

Customized Practice Management for Advisors Designed to Create and Execute on a Clear Path to Success

Perspective|Clarity|Accountability|Results

Your Path To Realizing the Full Capacity of Your Practice Begins with You

Evidence Based Coaching . . . What You Can Expect

- Thorough analysis designed to identify your destination
- Strategy and tools proven to generate revenue in the most scalable and efficient manner
- Best practices from a seasoned peer that can share the pitfalls and success stories collected from years in coaching
- Actionable techniques to deliver you out of limiting beliefs that prevent you from reaching the destination
- One on one sessions that quickly cut to the heart of the matter with surgical precision with the objective of both encouraging and challenging you

Access to Coaching

2-4 one on one virtual coaching sessions per month using Zoom

Every session is customized to the advisor's needs

Engagement can be short term or long term based on the advisor's objectives

Is Coaching and Practice Management For You?

- Your primary objective is to grow in an efficient, scalable manner
- You are a visionary with great ideas that are not coming to fruition
- You are approaching the end of your career and need a clear path to maximizing the value of your practice and efficiency in moving to the next chapter
- You are coachable

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John is the Investment Advisor Representative and VP of Business Development and Coaching at Peak Capital Management. He also drives business development and coaching among the financial professionals that PCM serves as an outsourced Chief Investment Officer. John has been an advisor and entrepreneur in the financial services profession since 1994. John maximizes his tenure in the industry by helping growth-minded people and business/practice owners get where they intend to go, faster, while making smart choices about their money. Ultimately, John helps his clients have the highest probability of achieving their ideal lifestyle, where they have the time, money, and significance they desire. John loves spending time with his wife, Lisa, and son, Jace, over family meals, playing board/card games, hiking, biking, skiing, and traveling. John also serves in the high school ministry at Mission Hills Church. John's passion is helping people maximize their potential and live life…on purpose.

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