

July 2015

BAM Bulletin

The BAM ALLIANCE ... By the Numbers

**\$26.7
Billion***

Combined assets under management or administration by the member firms of the BAM ALLIANCE

**As of June 30, 2015*

140+

Member firms in the BAM ALLIANCE

8*

Firms in the BAM ALLIANCE that have more than \$500 million in

We recognize the value of the time and energy you spend building your client relationships. With that in mind, we are sharing highlights, key updates and success stories from the BAM ALLIANCE community, so you can learn about how we are helping firms like yours leverage their time and resources to build successful, independent wealth management firms. We hope you will find these items informative and educational as you learn more about our prudent and proven approach.

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A BAM ALLIANCE Foundational Film: "Wealth With Wisdom" Featuring Jim Whiddon

The markets go up. The markets go down. And then they go up, down, up, down, up, down ...

But as proponents of evidence-based investing will tell you, your focus should not be on those fluctuations but on what keeps you steady in your life, the things that matter the most to you. In this BAM ALLIANCE foundational film, **Jim Whiddon** says, "I get to know my clients not only as friends but I really get to know the places they've lived, their hobbies, what they love, what they care about, what they want in life, what they need out of life."

managed assets

**As of June 2015*

52*

Firms in the BAM ALLIANCE that have more than \$100 million in managed assets

**As of June 2015*

13,575

Total number of visitors to the [BAM ALLIANCE website](#) during the second quarter of 2015

6,716

Total number of visitors to the [BAM Advisor Services website](#) during the second quarter of 2015

[Click here](#) or the image below to view this short film.



And the Award Goes to ...

We were thrilled to learn this past spring that another one of the BAM ALLIANCE's foundational films, "Beyond the Spreadsheet" featuring Carl Richards, was recognized with a 2015 Telly Award. This series of short films was created to help capture the essence of who we are and what we do.



[Click here](#) to view our award-winning film, "Beyond the Spreadsheet."

The New Culture of Advisory Success

How do you stay on the cutting edge of business culture innovation? In this article from [ThinkAdvisor.com](#), Adam Birenbaum, CEO of BAM Advisor Services, offers his thoughts on how a commitment to opportunity, mentorship and support is a key factor in building an advisory organization with a strong shared cultural vision.



Featured Insights From Dan Solin



Dan Solin, director of investor advocacy for the BAM ALLIANCE, writes of the value of showing more empathy and actively listening when it comes to interacting with your clients, in this pair of articles on AdvisorPerspectives.com.

[How Advisors Can Learn Empathy From Doctors](#)

What doctors are learning about the benefits of greater empathy can have major implications for advisors. There are ways to improve your empathetic skills and turn a stilted lecture into a meaningful conversation.

[How to Tell If a Prospect Is Interested](#)

"Active listening" skills may be far more important than the persuasive power of your presentation when it comes to keeping the attention of prospects. There are ways to tell if a prospect is listening to, and is interested in, what you're saying.

Join the Movement ... Join the BAM ALLIANCE

To have a conversation about becoming a member of the BAM ALLIANCE, please contact Brian Shapiro:

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