



CAPITAL MARKET CONSULTANTS

222 EAST ERIE STREET MILWAUKEE, WISCONSIN 53202

WWW.CMARKC.COM 414-727-7995

Building Business Together

BUSINESS CONSULTING SERVICES

CMC has an exclusive strategic relationship with business consultant PM Partners, Ltd. (PMP) in order to support the growth of assets in our clients' investment programs. PMP provides practice management, marketing and client support services to investment advisors and their support teams. This hands-on service can serve as a catalyst for more rapid business development.

Client/advisor benefits include:

- Learning to articulate an investment value proposition
- Developing dexterity in the use of the consultative sales model
- Enhancing client management skills from introduction to close
- Standardizing business practices for enhanced scalability
- Developing short and long term business goals and objectives

Like other CMC services, all business consulting service arrangements are tailored to the needs of each client.

In combination, CMC and PM Partners form a powerful resource that allows advisors to focus on the core of their business: gathering assets and managing client relationships.

ABOUT US

Founded in 2002 CMC is located in Milwaukee and serves a broad range of clients throughout the United States. Flexibility, service and choice define our consultative approach to client relationships.

Founded in 2010, PMP serves a broad range of clients throughout the United States. A tailored and consultative service model define PMPs approach to client service.

Mission

Our combined mission is to enable financial advisors and investment consultants to more efficiently serve their clients, accelerate the growth of their business and become the investment provider of choice in their local markets.

Clients

PMP serves advisors and the sales and marketing teams that support them, including local office, regional and national staff personnel. Our clients include banks, wealth management firms, broker-dealers, accounting and law firms and insurance companies.

For more information contact George Patten via phone: 414-233-2682 or email: george@cmarkc.com.