

NEWS

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Operations Strategist Claire Alexander Announces Masterclass for Financial Advisors Scaling to \$1B+

*Exclusive event for advisory firm principals strategically focused on
architecting elite-scale growth, reclaiming personal freedom, and
building sustainable legacies without sacrificing a big life*

Seattle, WA – January 6, 2026 – [Claire J. Alexander](#), the respected operations strategist and trusted advisor behind some of the financial services industry's most aggressive AUM expansion arcs — including assisting advisors in scaling firms from \$100M to \$3.5B in just three years — has announced **The Billion Dollar Firm Trifecta Masterclass**. This exclusive intensive is designed for financial advisory leaders navigating the complexity that comes with accelerated firm expansion.

The Billion Dollar Firm Trifecta Masterclass is set for January 20, 2026. The 180-minute virtual masterclass is designed as a senior-level conversation focused on the decisions, structures, and leadership shifts required to scale thoughtfully and sustainably. The session culminates in the final segment, where the Trifecta — Architecture, Authority, and Alignment — is fully integrated into a cohesive roadmap for durable, permanent growth.

Participation is intentionally limited to preserve a peer-level, high-trust environment. While the masterclass is invitation-only, a small number of additional advisors may be considered by referral or expressed interest. Those who feel aligned are welcome to indicate their interest for review here: <https://www.thearchsanvil.com/billiondollarfirmmasterclassinvite>

THE THREE A'S OF LASTING SCALE

To ensure attendees leave with a complete roadmap to \$1B+, a trio of experts will assemble to solve the three critical pillars of firm evolution:

Pillar #1: Architecture (Operations) – Claire Alexander, founder and CEO of The Arch’s Anvil, will guide participants through the structural design required to move from founder-dependent growth to firm-based scale. By shifting from 'Chief Operator' to 'Firm Architect,' leaders reclaim personal capacity while building the high-performance infrastructure necessary to navigate massive growth curves. Alexander’s expertise, featured in Yahoo! Finance and Advisorpedia, lies in solving the operational “messy middle” that defines high-stakes expansion.

“When a firm’s momentum is tethered to the founder’s personal input, it eventually hits an invisible ceiling where further growth requires an unsustainable level of individual effort,” said Alexander. “I’ve seen founders at the \$200M and \$500M mark realize that their current success has become their primary constraint. This Masterclass is designed to help leadership navigate that transition — shaving years of ‘trial and fire’ off the trajectory by building a structural architecture that supports the ultimate goal of lasting scale and personal freedom and not just the next growth phase.”

Pillar #2: Authority (Reputation) – Marie Swift, founder and CEO of Impact Communications, has become the undisputed authority on building visibility and enhancing reputations since launching her PR and marketing firm in 1993. Swift will share how a select group of highly-successful independent financial advisors have used her proven Impact Formula to move beyond hometown hero to industry icon, ensuring that their firms attract elite clients and top-tier talent through brand gravity, not traditional marketing effort.

“Brand gravity is the strong, magnetic pull a company intentionally creates overtime,” Swift explained. “It works like magic to draw the right clients to you naturally through emotional connection, consistent value, and hyper-relevance. Wealth management teams that adopt the Impact Formula do not chase clients. Instead of shouting for attention, a brand with gravity engages in lasting conversations and relationships, pulling people in organically. I’m delighted to share their success stories and select pages from their playbooks during Claire’s masterclass.”

Pillar #3: Alignment (Leadership) – Scott Danner, a former financial advisor turned life advisor and creator of the L.I.F.E. Model, brings the firsthand leadership perspective of scaling a firm through high-stakes transitions. He will share the leader-to-leader mechanics required to grow without losing what matters most. Through his proprietary framework, Danner helps founders align ambition, family, faith, and freedom, ensuring they achieve deeper meaning and clarity as their firms reach elite-scale. Danner is a champion of high performers — and those who strive to be the best version of themselves.

“Scale magnifies everything,” said Danner. It magnifies systems, leadership, and blind spots. The real work isn’t just building a bigger firm. It’s becoming the kind of leader who can hold that growth without losing what made it worth building in the first place.”

BILLION DOLLAR BLUEPRINT

“Hard work has a ceiling,” Alexander cautions. “We are here to show leaders exactly how to break through without losing their passion — or their family life — to the exhaustion of un-architected growth. It happens more often than you might imagine, but it’s entirely avoidable when the firm is built on a foundation of structural design.”

To move from understanding to execution, attendees will receive priority access to a pathway for assessing team capacity, authority positioning, and leadership alignment—linking the firm’s vision to an operational process that performs with excellence while amplifying the mission. Participants will leave with a clear understanding of how Architecture, Authority, and Alignment integrate to support durable scale and leadership sustainability.

Learn more about The Billion Dollar Firm Trifecta Masterclass here:
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