SYMMETRY®

ADVISORFEST

EXPERIENCE • GROWTH • TRANSFORMATION

Delivering a Better Client Experience

ADVISORFEST

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Presented by:

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Digital Marketing Specialist

Our Why

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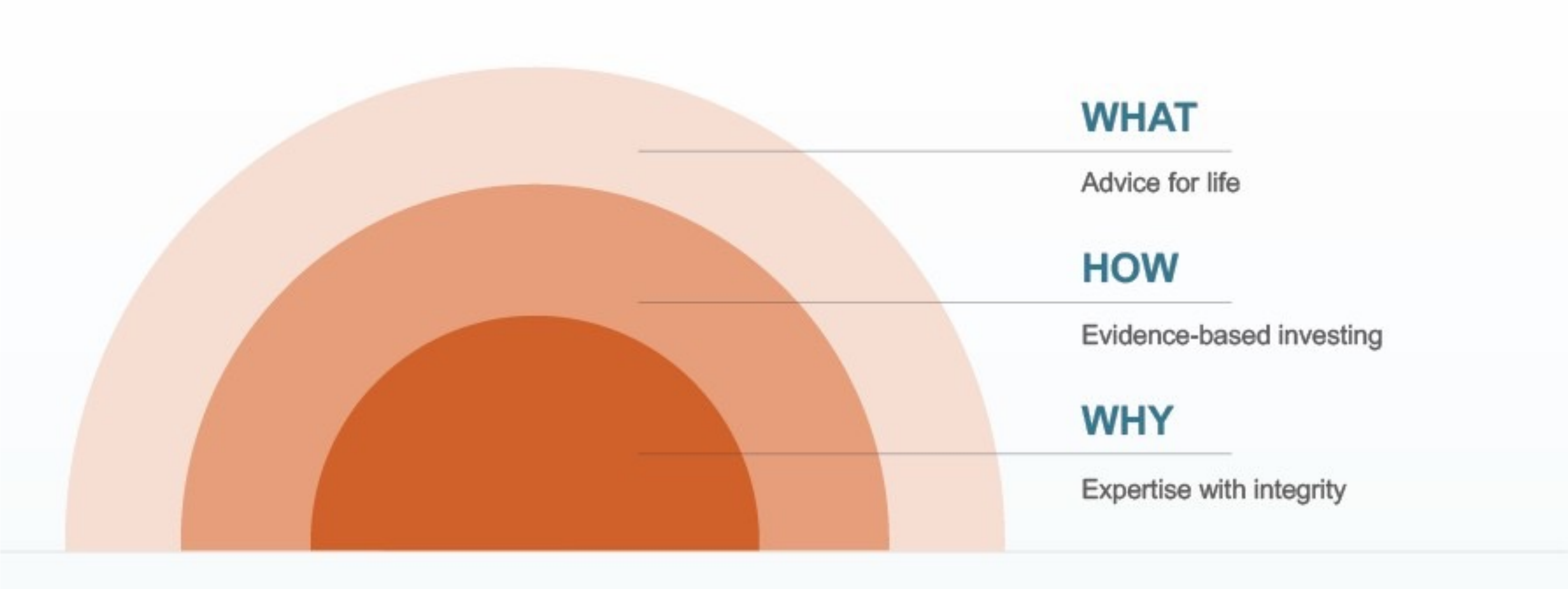

How We Help Advisors

What We Do

Comprehensive Business Partner

Experience
Help Your Clients

Growth
Help More Clients

Transformation
Help Yourself
& Your Team

How We Help Advisors

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What We Do

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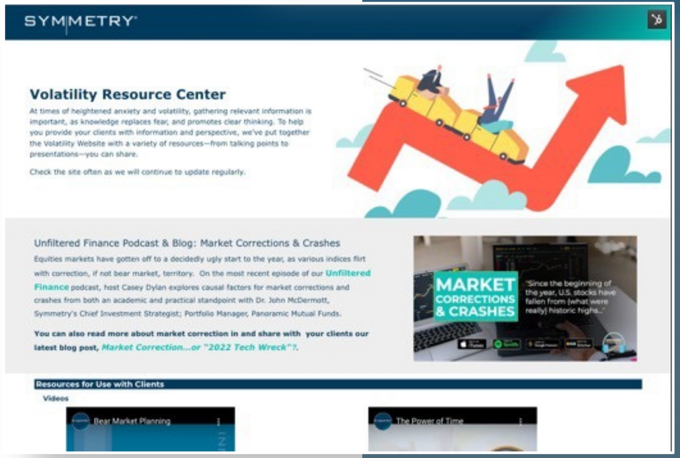
Help Yourself & Your Team

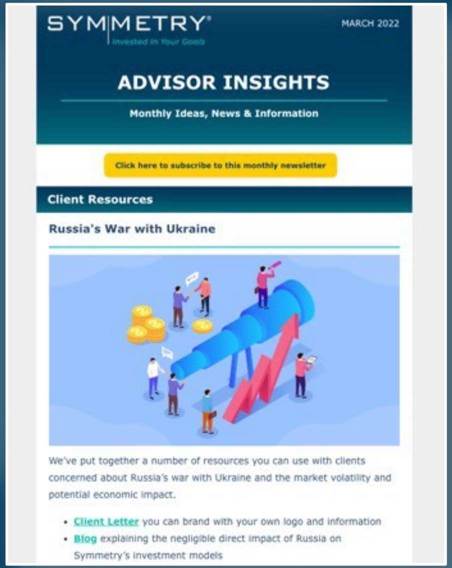
Experience Resources

Help Clients

- 1-on-1 Business Consultations & Strategy
- White Labeled Materials
- Video Capabilities
- Client Communications
  - *OnBalance* Monthly Newsletter
  - Quarter-in-Perspective Presentation & Quarterly Commentary
  - Client Calls & Webinars
- Special Resources
  - Volatility Center & Checklist
  - Year-End Center & Checklist
  - Tax Center
- My Symmetry

SYMMETRY





How We Help Advisors

SYMMETRY®

Comprehensive Business Partner

Experience
Help Your Clients

Growth
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Transformation
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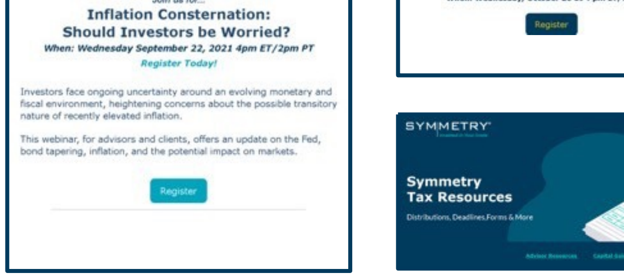
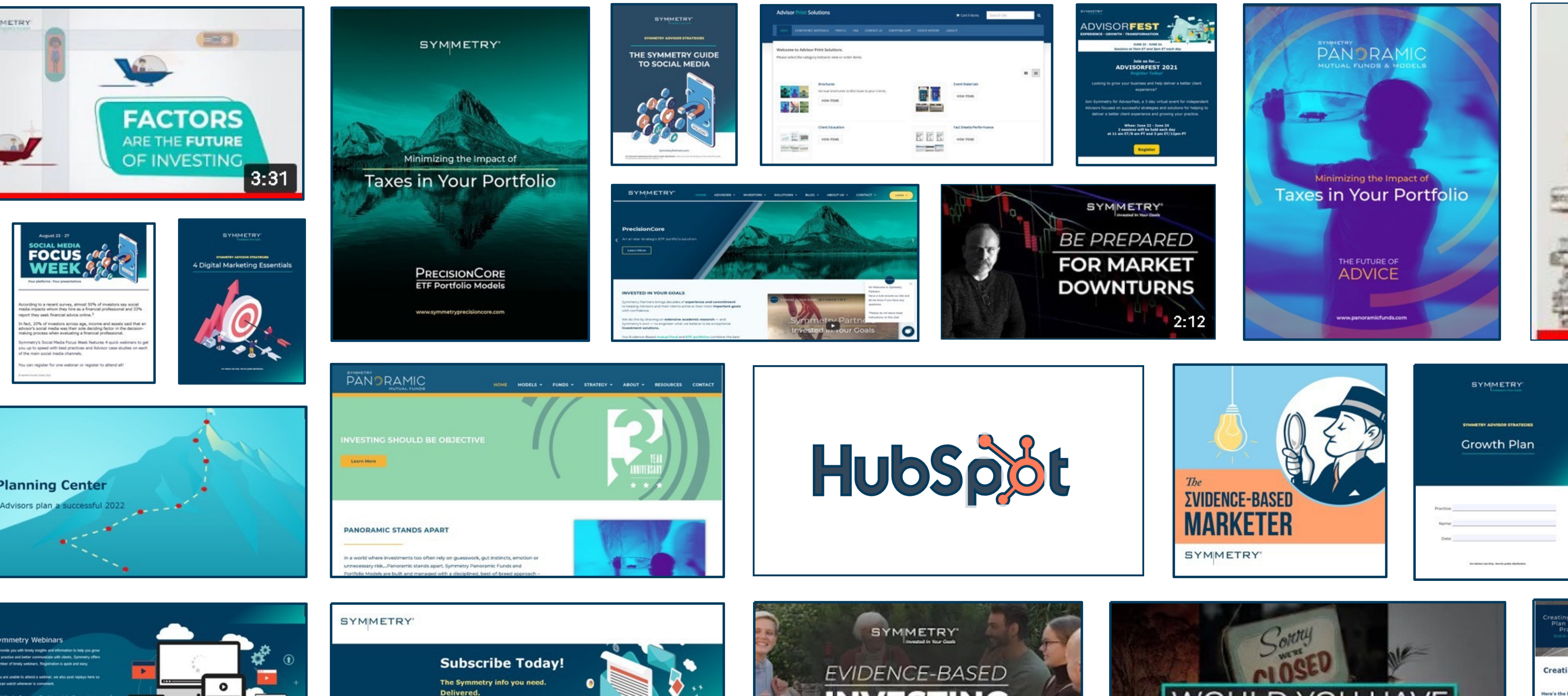
Full Suite of Marketing Materials

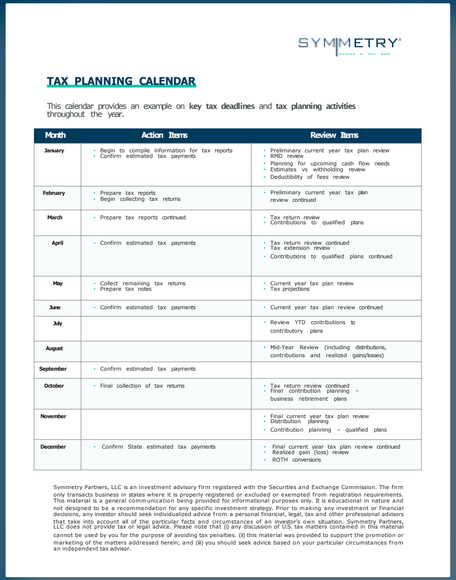




Growth Resources

Help More People

- 1-on-1Business Consultations & Strategy
- White-Labeled Materials
  - Presentations
  - Brochures & Fact Sheets
  - Videos
- Educational Whitepapers
- Prospecting, Referral, and Retention Support
- Portfolio Analysis and Reviews
- Hypothetical Illustrations
- Event Support



How We Help Advisors

SYMMETRY®

Comprehensive Business Partner

Experience	Growth	Transformation
Help Your Clients	Help More Clients	Help Yourself & Your Team

Transformation Resources

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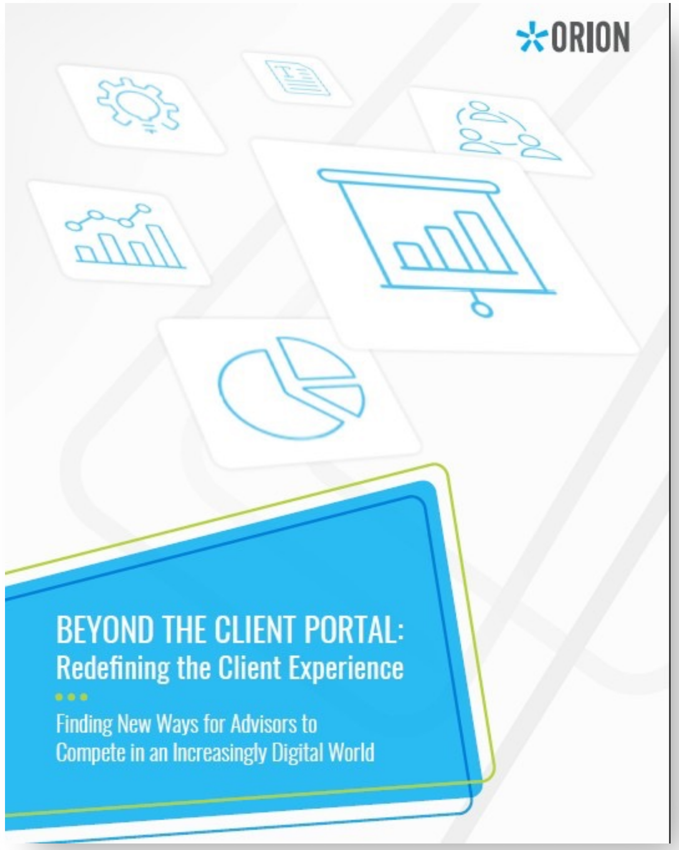
Help Yourself & Your Team

- Dedicated Regional Teams
- Customized Onboarding
- Practice Management Resources
    - Marketing Diagnostic
    - Referrals Guide
    - Presentation Library
    - Growth Plan
    - Strategy Canvas
- Advisor Insights (Monthly e-Newsletter)
- Monthly Podcasts
- Educational Events & Monthly Webinars (many with CE)
- Advisor Community

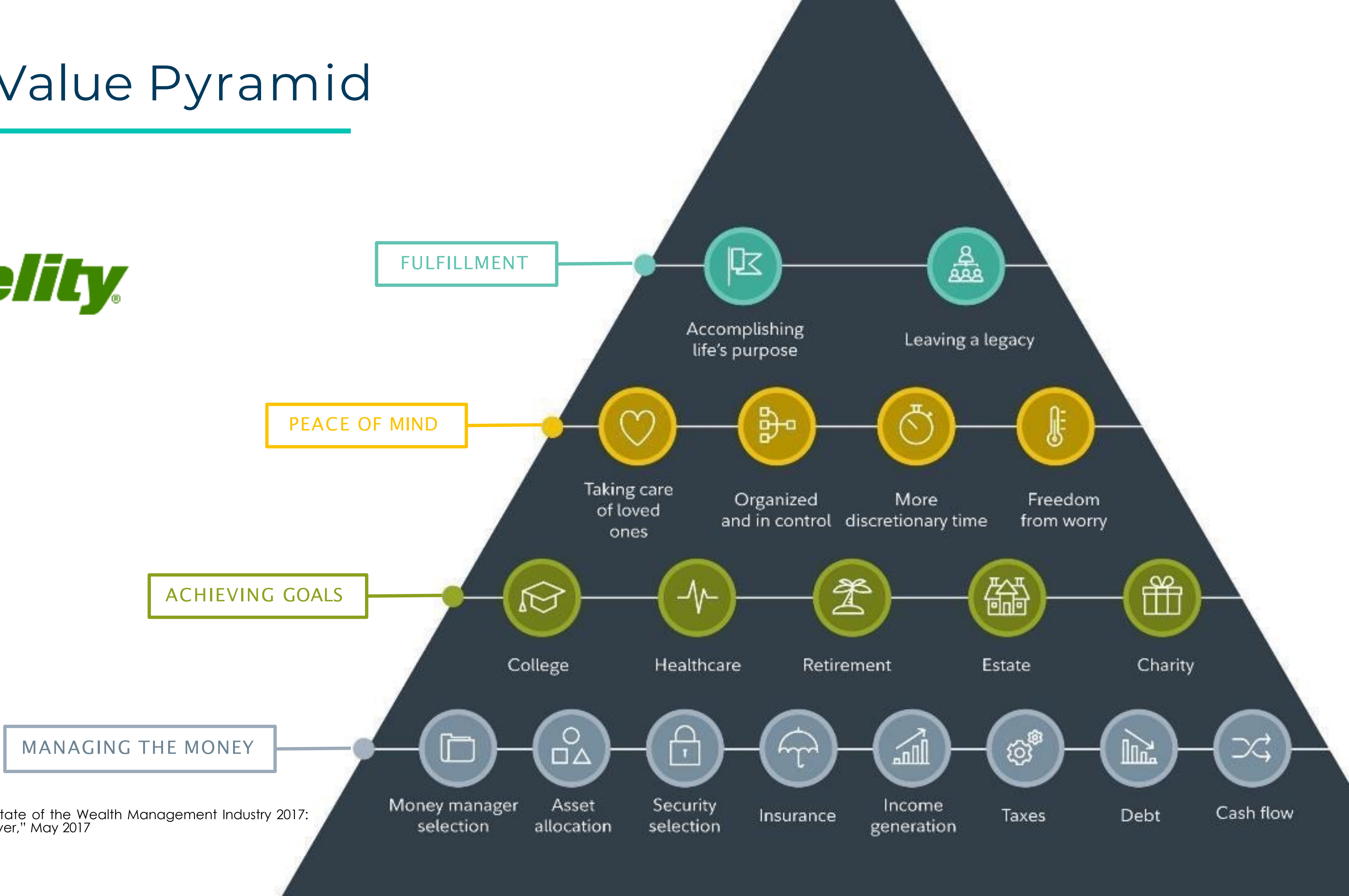
Firms Focusing on Client Experience…



- Grow **5x** faster than those that don't
- Command **16%** price premium on products & services

Source: *BEYOND THE CLIENT PORTAL: Redefining the Client Experience*. Orion, 2019

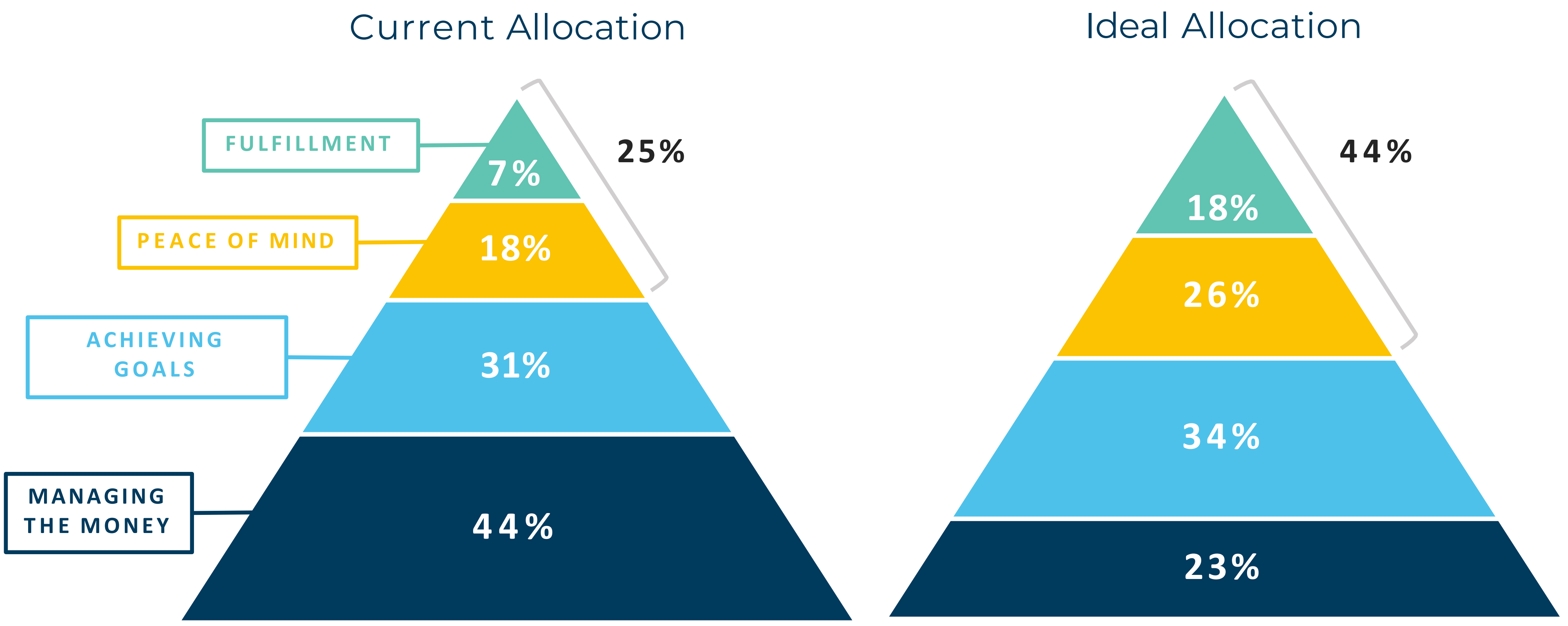
The Value Pyramid



Source: Fidelity, "State of the Wealth Management Industry 2017: The New Value Driver," May 2017

Time & Value

"How would you ideally like to allocate your time with a typical client?"



Source: 2017 Fidelity Value of Advice Day Pre-Work Survey completed online by attendees in advance

People will forget what you **said**,
people will forget what you **did**,
but people will never forget
how you **made them feel**.

— MAYA ANGELOU

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Questions?

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Thank You

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