



SYMMETRY®
SUMMIT

Creating Your 2023
Growth Plan

Andrea Loin,
Associate Director, Marketing

Top Strategic Goal: Marketing/Bus. Development

Improve the firm's **marketing** and business development efforts

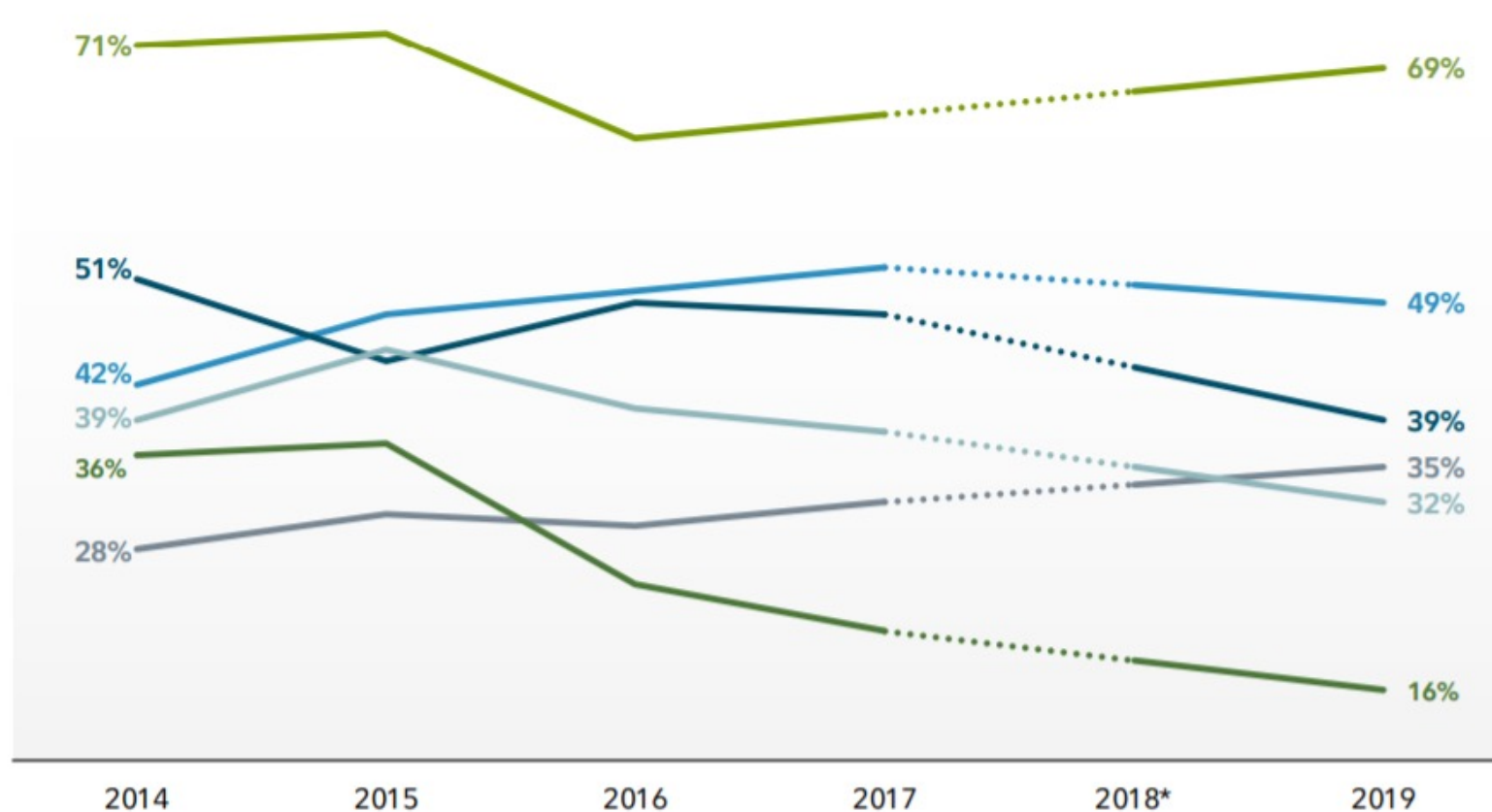
Invest in new or existing **technology**

Improve **strategic business planning** and execution

Improve **client satisfaction**

Improve **investment performance**

Develop or enhance a **succession plan**



Source: 2020 Fidelity RIA Benchmarking Study.

Marketing Ideas



10 FREE



100 OF THE BEST

Marketing Ideas

You Can Actually Use Right Now



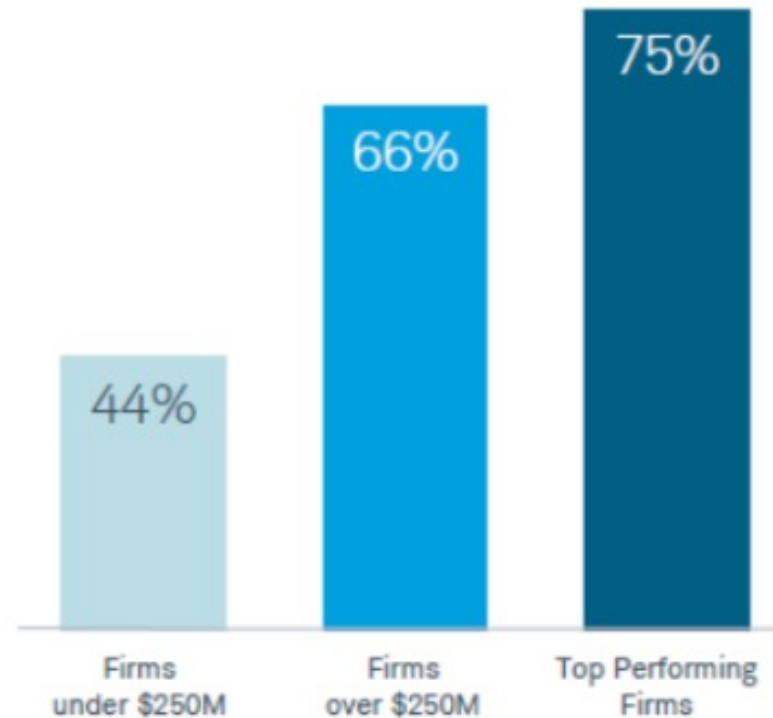
to Boost
Your Business





The Power of a Plan

75% of top performing firms have a **written strategic plan**



Source: 2020 RIA Benchmarking Study from Charles Schwab



SYMMETRY ADVISOR STRATEGIES

Growth Plan

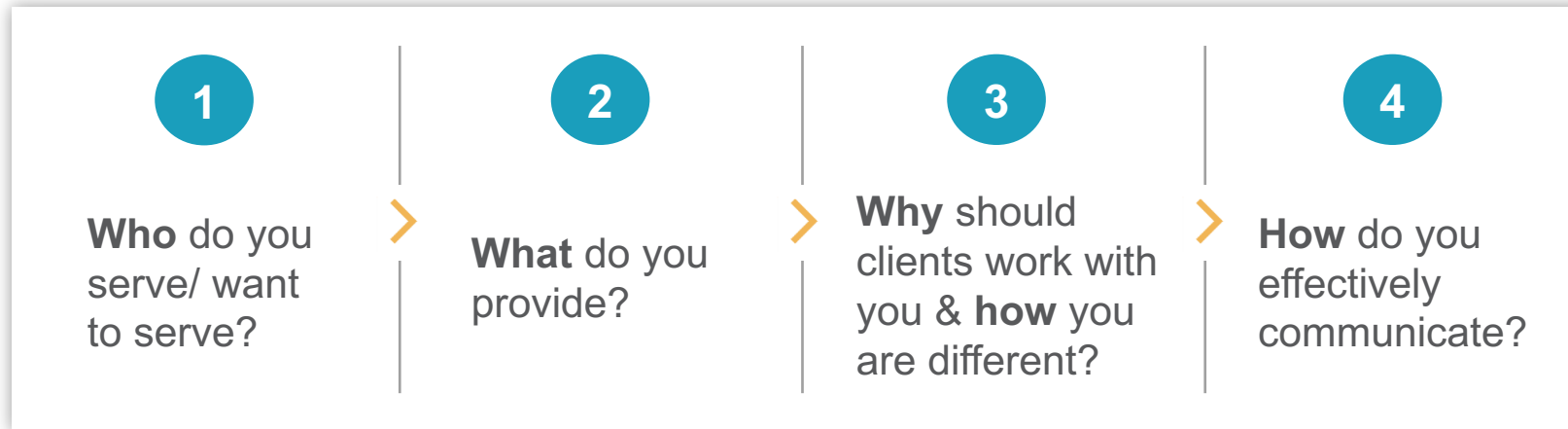
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Date: _____

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4 Fundamental Growth Questions



1. Who Do You Serve/Want to Serve?



- What are your client demographics?
- Psychographics?
- Niche/Special interest groups (e.g., dentists, executives)?

SYMMETRY ADVISOR STRATEGIES



Who Do You Serve/Want to Serve?

Exercise 1

Demographics:
Your clients' key info

Age, gender, income,
geographic location,
marital status

Serve Today

Want to Serve

Psychographics:
*Your clients' lifestyle,
behaviors, habits*

Personality, values,
opinions, attitudes,
interests

Serve Today

Want to Serve

Niche:
Special business focus

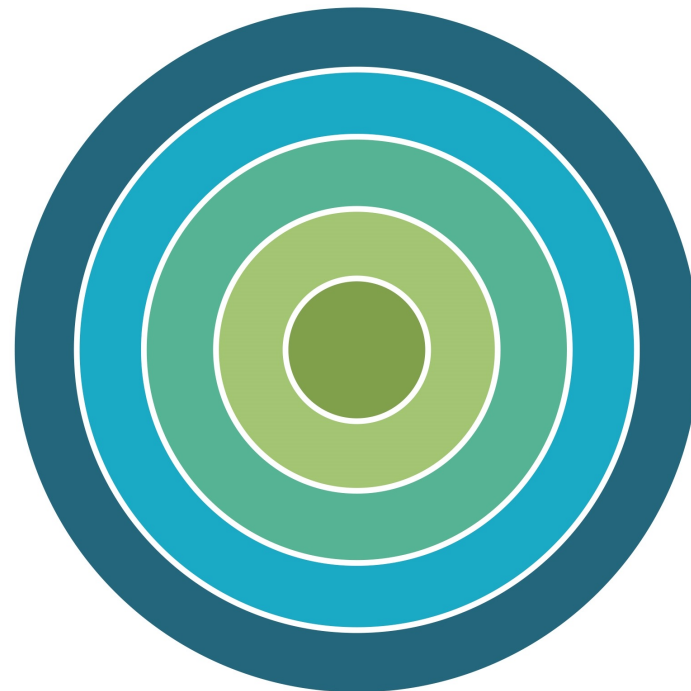
Occupations, skills,
organizations,
affiliations

Serve Today

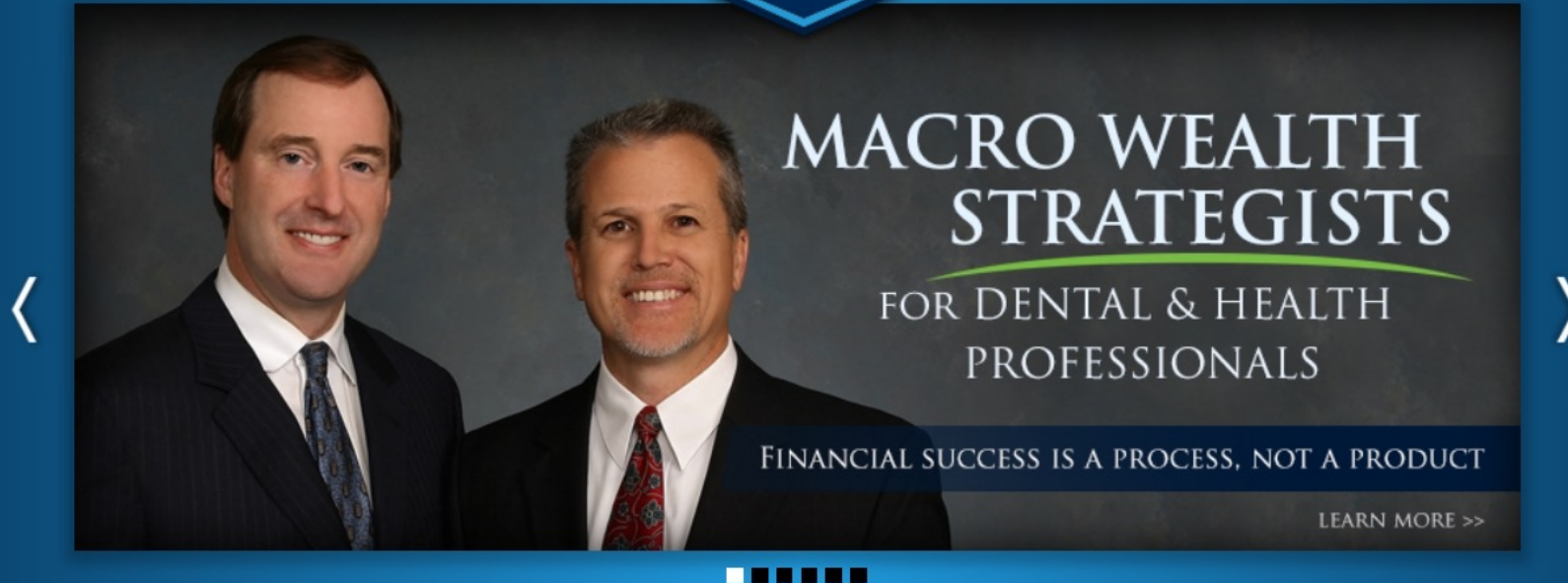
Want to Serve

The Power of Focus

Increases Likelihood You Will Get Results You Want to Achieve



- Pre-Retirees
- Aged 50-60
- Business Owners
- With > \$400k to invest
- Within 100 mile radius



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MERIT WEALTH

US YOU WORKING TOGETHER THE DOCTOR'S 401(K) EDUCATION CONTACT

Client Login

MERIT WEALTH

Merit Wealth is an independent advisory firm focused on helping physicians, dentists & accomplished families plan for and enjoy their preferred financial futures.

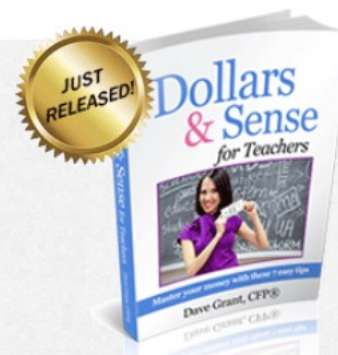
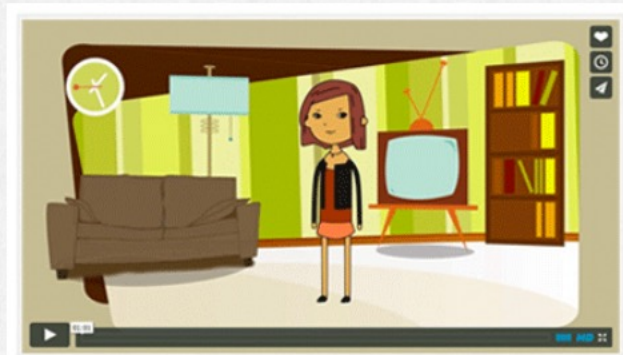


PERSONAL ADVICE

Schedule an Appointment!



SEARCH OUR WEBSITE ...



Get the book here →

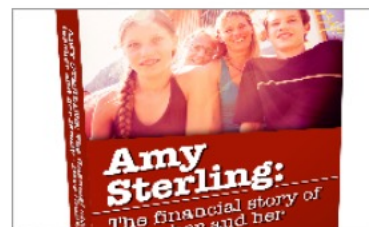
Services

- Hourly Planning
- Ongoing Planning
- Investment Management

Thoughts



Books





[Client Access](#)

[ABOUT](#) [WHO WE HELP](#) [HOW WE HELP](#) [OUR PARTNERS](#) [CONTACT US](#)

Hertel Financial - Our Mission

We provide personalized, comprehensive financial planning—focused on making life's financial journey more secure and comfortable—for successful families, executives, and small businesses in Colorado and the Mountain states.

| [ABOUT US](#)

Boeing Employees

We have worked with hundreds of Boeing employees over the years. While everyone's goals are different, our extensive knowledge of Boeing's pension and benefits plans can help you maximize your retirement. If you're a Boeing employee looking toward retirement, you are probably wondering the following:

Q

Is my Boeing Company Voluntary Investment Plan (VIP) set up to meet my goals?

A

Whether you're a machinist, engineer, manager, or contractor, we can help you discover if you are fully utilizing this benefit as we understand the complexity of fund selection within the VIP. However, fund selection is just one

Q

How easy will it be for me to transition into retirement?

A

The transition from work to retirement is always at least a little difficult – financially and psychologically.

First and foremost, your future depends on your financial plan. A lot of people think financial advisors are just here to

Blankenship Financial Planning
116 West Illinois Street

New Berlin, IL 62670

Phone 217-488-6473

Email: info@blankenshipfinancial.com

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- [What is Financial Planning?](#)
- [Questions to Ask](#)
- [The Blankenship Financial Planning Difference](#)
- [How to Get Started](#)
- [Map to the Office](#)

- [Services @ Blankenship Financial](#)

Excellent Financial Advice for Everyone

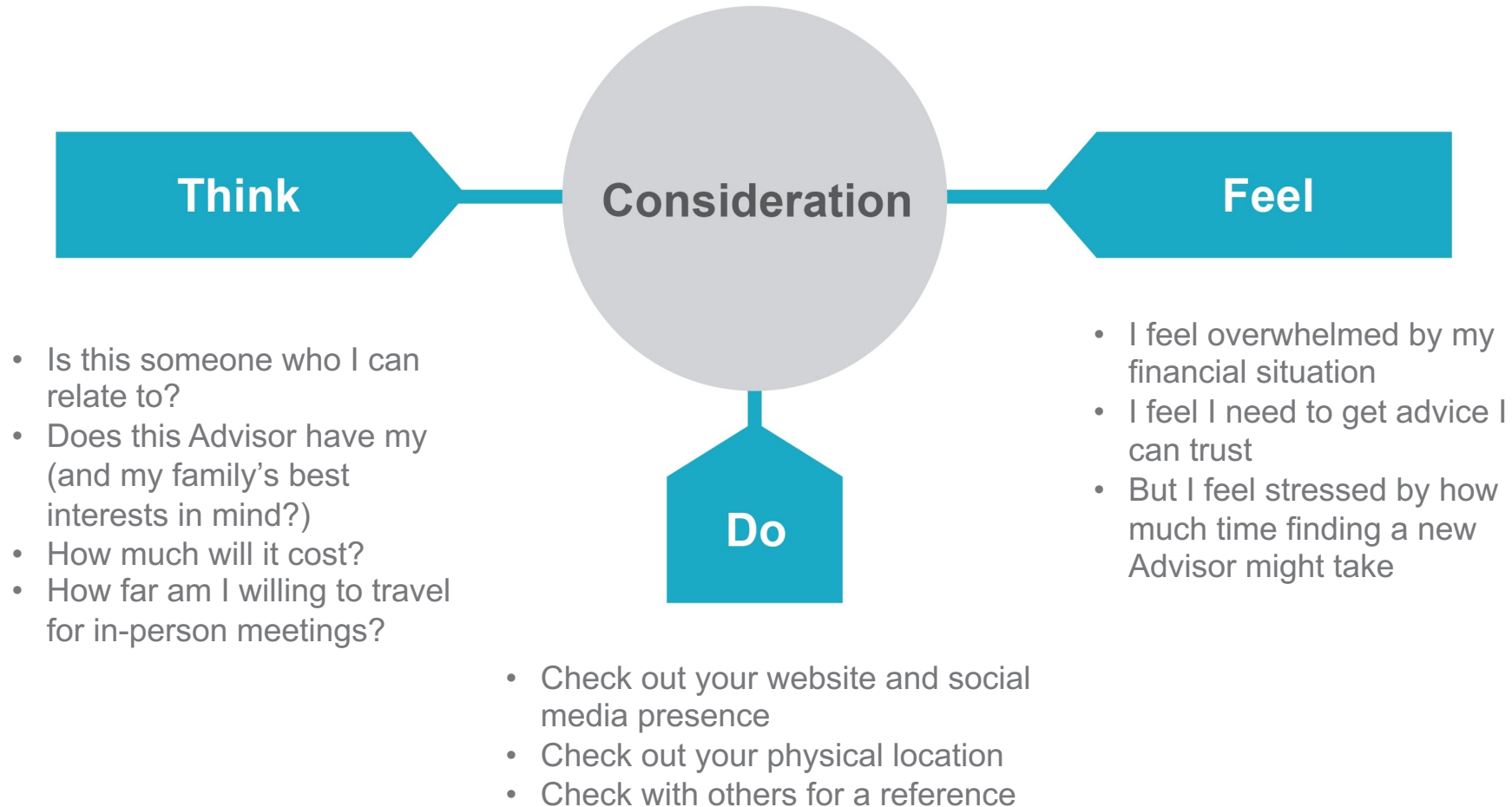
After scrimping and saving most of your life, you're getting close – you're thinking a lot about when you can retire. This can be an exciting thought, but also pretty scary. It's around this time in your life that you start to realize:

- you're at the point in your life where you must get a handle on your financial situation – but where do you start?
- floating along as you have been, without direction or guidance, has got to change – but how?
- you really could use a second opinion on what you're doing financially – a way to validate that you're doing the right things
- procrastination is no longer an option – time is running out. Retirement is just around the corner!

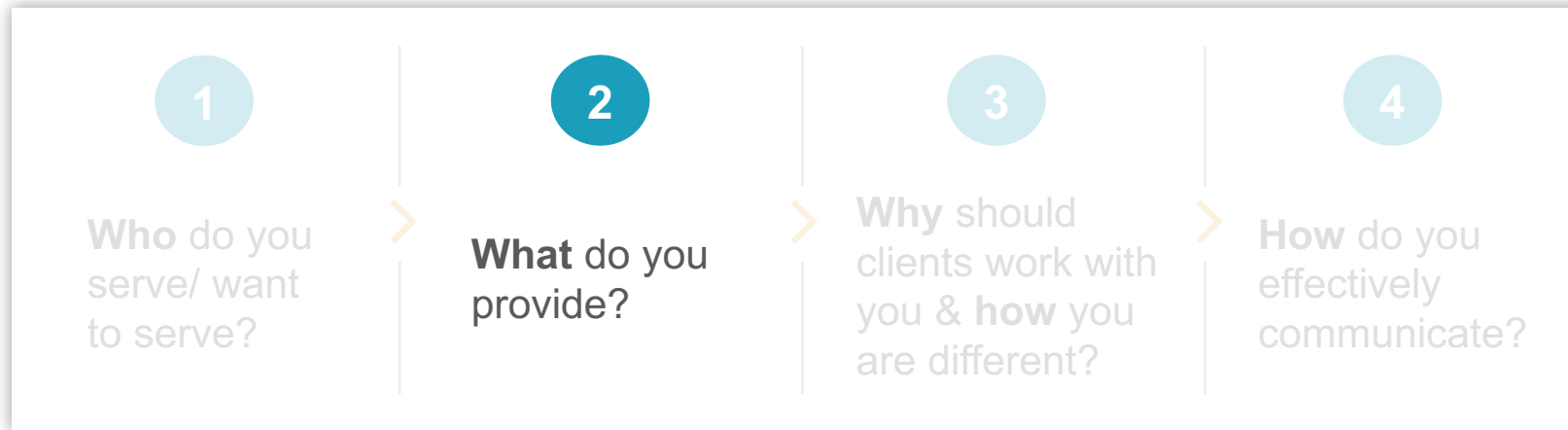
The Important Little Details

What Does Your Ideal Client Think, Do, Feel When Considering Whether to Work with You (or Not)?

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2. What Do You Provide?



- Are you selling product or building relationships?
- Is your offer right for those you serve/want to serve?

What Do You Provide?

Exercise 2

Check the top 5 areas your ideal clients tend to focus on and answer questions below:

- Comprehensive **financial planning**, including budgeting and prioritizing goals—such as paying off student loans or buying a house
- Making sure client portfolios supports their long-term goals through **investment management**, including consulting on retirement plan options at work
- Making sure client portfolios support their values through **values-based investing**
- Protecting clients & their families, including their assets, health, and businesses through **insurance**
- Helping clients plan and prepare for **educating** children
- Helping **business owners** protect their business, provide benefits to employees, or buy or sell a business
- Making sure clients are not overpaying taxes through **tax optimization and tax efficiency strategies**
- Making sure clients have money to pay for the unexpected as well as ongoing expenses (such as mortgages and student loans) through **cash flow planning**
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- Helping clients understand and navigate their options around **Social Security, Medicare, long-term care and healthcare directives**
- Helping clients with **philanthropy** through vehicles such as Donor-advised funds and charitable-remainder trusts
- Helping clients leave a **legacy** for loved ones and preferred charities through estate planning
- Working closely with a client's other financial professionals, including their CPA and Estate Attorney, to ensure an efficient and **coordinated approach**
- Other

Do your clients know you provide these services?

Yes No

Do you regularly discuss the services (or products) you provide?

Yes No

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Our Services

At Maynard & Associates Wealth Management, we provide expert assistance in the following areas:

Investments

- Annuities – Fixed and Variable
- Stocks
- Bonds
- Mutual Funds
- Educational IRAs
- Roth IRAs
- SEP IRAs
- Simple IRAs
- Traditional IRAs

Financial Planning

- 401(k) Plans
- 403(b) Plans
- College Savings Plans
- Estate Planning
- Money Management
- Profit Sharing Plans
- Retirement Planning
- Social Security Planning

Insurance

- Disability Income Insurance
- Life Insurance
- Long Term Care Insurance



Our Services

"Real Solutions for Real People"

At Speer Wealth Management we work to provide real solutions for real people. We are a full service financial firm. We appreciate that every client comes to us with different needs and goals. Do you want to save for retirement, prepare to send your children to college, or grow your wealth through sophisticated strategies? We enjoy getting to know our clients as individuals and devising the plan that best suits their unique needs.

We are hands on and proactive to attempt to not only protect our clients' assets, but also allow their investments to grow. If we can find solutions outside of the traditional markets that fit your needs, we will seek to do so. We are known for our ability to take the steps necessary to mitigate the risks to our clients' portfolios. In fact, we'd rather have investments secured as cash and get no return than to lose money.

- FINANCIAL ADVICE
- INCOME PLANNING
- PORTFOLIO ANALYSIS & RISK ASSESSMENT
- INVESTMENT RISK MITIGATION
- SOCIAL SECURITY & PLANNING
- INVESTMENT STRATEGY DEVELOPMENT
- RETIREMENT PLANNING & CASH FLOW
- FAMILY FINANCIAL PLANNING
- COLLEGE INVESTMENT PLANS & STRATEGIES
- LIFE INSURANCE REVIEW
- WEALTH & INVESTMENT MANAGEMENT
- NON-STOCK MARKET SOLUTIONS & STRATEGIES

Core Services

Annuity >

Financial Planner >

Investment Advisor

Life Insurance >

Retirement Planning

Semmax Tax

Wealth Management

Your 401(K) & IRAs

Your Legacy

Your Retirement Income

Financial, P

Investment Services



To develop a financial s
a complete, 360 degree

important for your financial professional to see
ure, including how your retirement assets are

The Semmax Financial Group team offers a truly unique financial experience. With the combined expertise of the team's top professionals, we are proud to offer our clients an expanse of comprehensive financial services.

Semmax Financial Group's core offerings are structured into three areas:

- *Semmax Financial Advisors* is the firm's Registered Investment Advisory, providing customized asset management solutions and portfolio strategies for the individual.
- *Semmax, Inc.* considers the individual's insurance needs, including long-term care insurance and life insurance for estate planning, as well as offering a host of annuity products insured

877-856-0080

Semmax University



[Click here to view more videos.](#)

Free Retirement Guide



Discover 10 things you should consider in creating your retirement income strategy.

Enter your information below so we can mail you your guide.

Retirement Planning

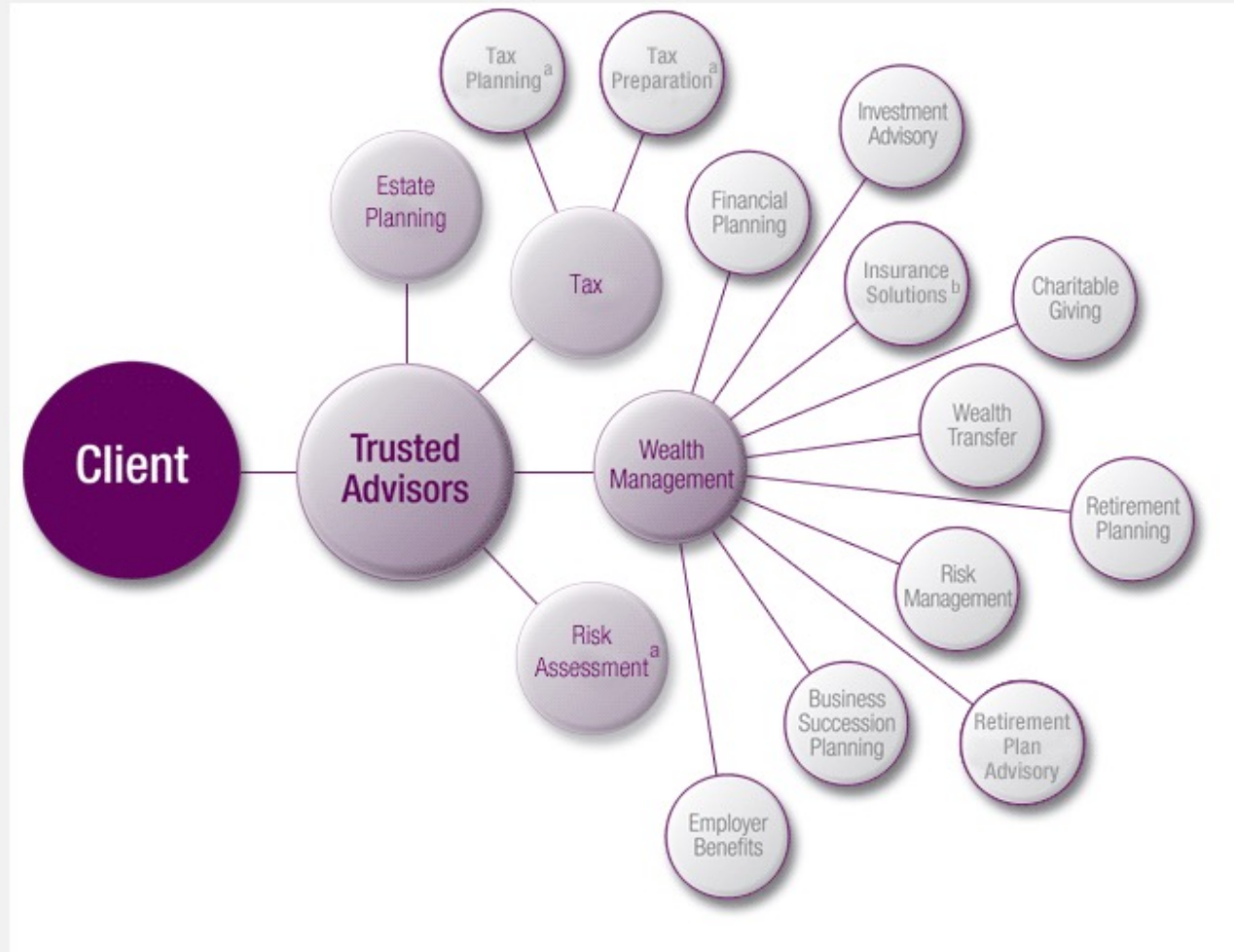
Risk Management

Retirement Plan Advisory

Business Succession Planning

Employer Benefits

People and locations



PRW Wealth Management provides solutions designed to provide more efficient use of your growing resources, improve net worth, reduce income and estate taxes, and increase after-tax cash flow.

Depending on your needs, PRW can offer the following client solutions:

Strategic Planning

Today's complex and ever-changing financial world makes the need for comprehensive, professional advice even more compelling, especially for high net worth and ultra high net worth individuals, families, and businesses. Our strategic planning process includes:

- ◆ Review of current resources, goals, and constraints
- ◆ Assessment of progress towards planning objectives
- ◆ Comprehensive strategic plan including resulting action items

Investment Management

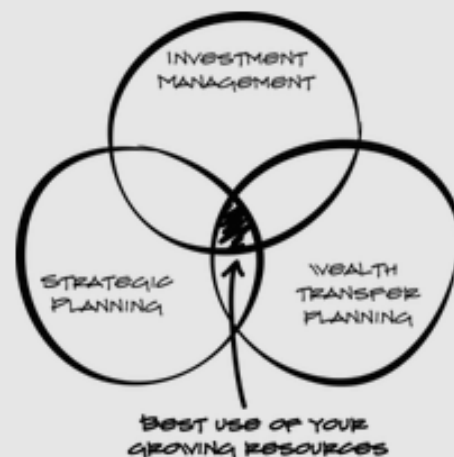
Customized investment strategies:

- ◆ Managed portfolios
- ◆ Separately managed accounts
- ◆ Tax- managed/concentrated position strategies
- ◆ Alternative investments:
 - ◆ Private equity
 - ◆ Private REITs
 - ◆ MLPs

Wealth Transfer Planning

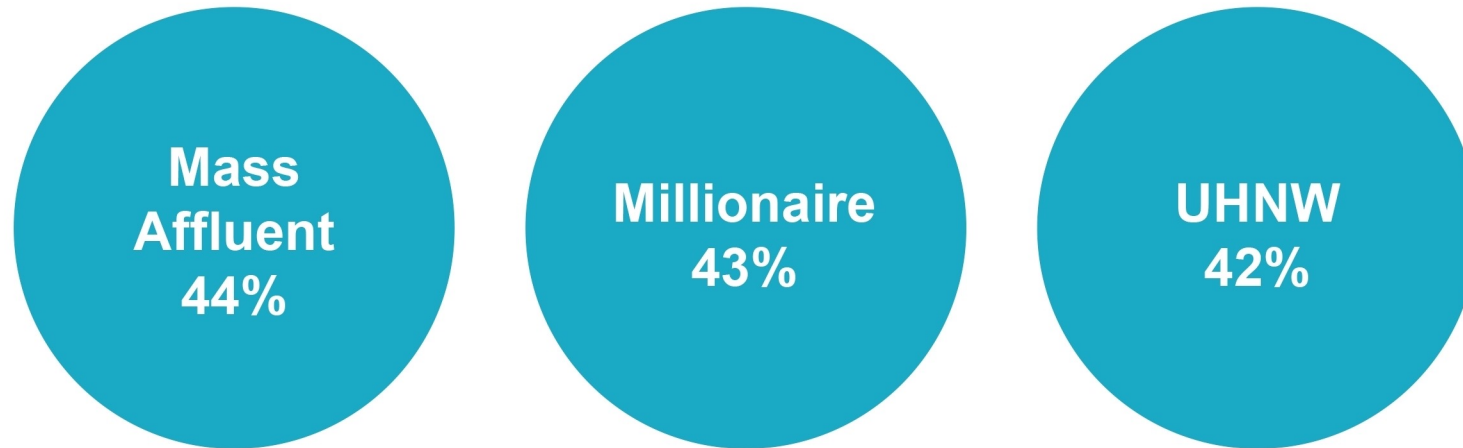
Sophisticated wealth preservation strategies and life insurance designs:

- ◆ Strategic planning informed by mortality analysis and risk parameters
- ◆ Philanthropic giving strategies
- ◆ Business succession/buy-sell planning
- ◆ Independent access to best-in-class insurance markets
- ◆ Systematic process of evaluating, constructing, and servicing customized life insurance portfolios




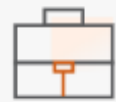










Financial Advisors More Focused on Selling Products than Helping Clients?

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Source Spectrem Group 2015
<http://349ab54c3b58919c6638-ff70f51d4942f2bbd11ba0e41cfec577.r51.cf2.rackcdn.com/Fiduciary%20Whitepaper.pdf>

Educate Clients on How to Refer

 Vision →	 Business →	 Legacy →	 Education →
 Retirement →	 ? →	 Philanthropy →	 Family & Lifestyle →
 Health →	 Minimizing Taxes →	 Protecting Against the Unexpected →	<p>Are you making the most of your Retirement Plan choices at work? Do you have stock options or other deferred compensation? Are you thinking about another career? We can help you understand all your work and career options.</p> 

Breathe Easier[®] About Your Financial Future

Choose A Goal On The Wheel
& Take The Quiz Right Now!

GET STARTED NOW!



Our Services

At Henry Wealth Management, we offer a comprehensive approach to all of your financial planning needs. Whether you are just starting out, nearing retirement, or already there, we have the experience, tools, and perspective to help you achieve your most important goals.



PLAN

Our approach to financial planning covers all the important areas of your life and finances. Our comprehensive approach is grounded in our **MoneyMap process**.

[LEARN MORE](#)



INVEST

Once your financial plan is in place, we use an **Evidence-Based, best-of-breed investment philosophy** backed by research from some of the best minds in academia.

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PROTECT

In order to be prepared for the unexpected, it is important to have proper protection strategies in place, including **insurance**, to protect yourself, your business, and your loved ones.

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PERSONAL ADVICE

YOUR PROFESSION

We specialize in working with dentists and physicians (as well as other accomplished professionals) who have achieved significant success in their fields. Our team understands the unique opportunities and challenges in front of you and how to create a comprehensive long-term plan around them.

YOUR MONEY

With all the demands on your time, developing and implementing smart strategies for your finances isn't easy. We'll partner with you to help guide and manage your financial goals, so you can focus on living your life, confident that you have a sound, evidence-based plan in place.

YOUR LIFE

Your success is not an accident. You've worked very hard to get here. As you prepare for financial independence or the next phase of your life, we'll help you be intentional about your vision, values, priorities, and goals.

COMPREHENSIVE WEALTH MANAGEMENT



What Do You Provide?

Exercise 2

Check the top 5 areas your ideal clients tend to focus on and answer questions below:

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Yes No

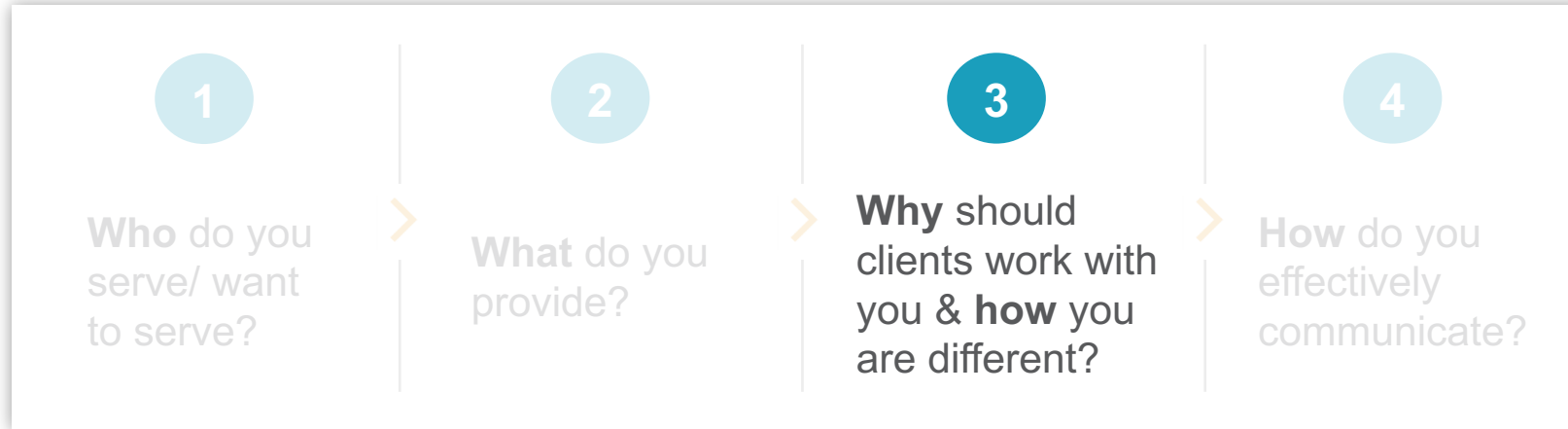
Do you regularly discuss the services (or products) you provide?

Yes No

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3. Why Clients Work With You & How You are Different?

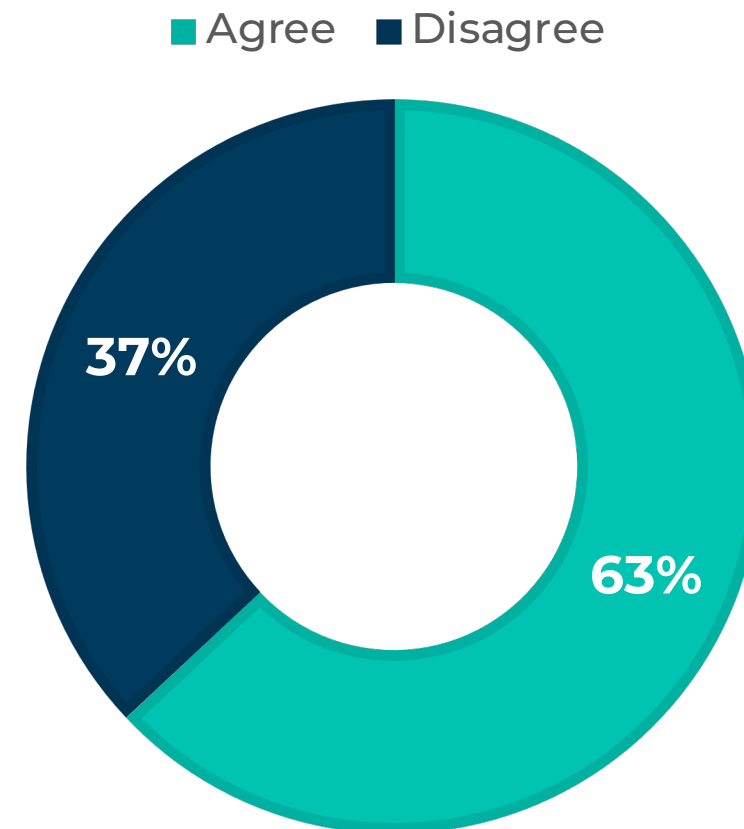
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- What makes YOU compelling?
- What do your clients value about you?
- What is your mission/value?

Investors Think Advisors are All the Same

All financial advisors make the **same** promises, making it difficult to distinguish between them.

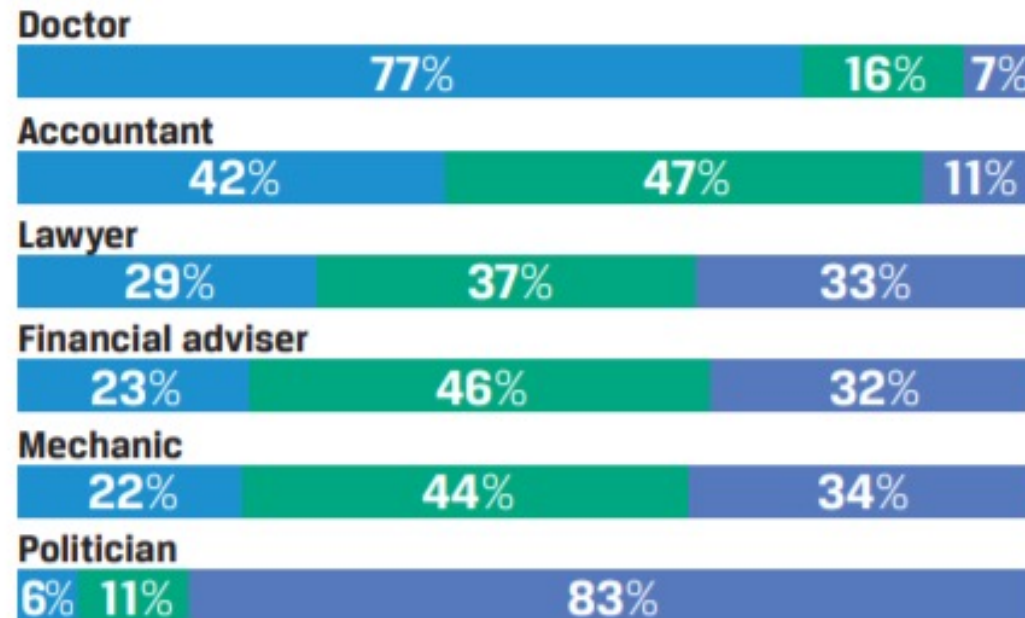


Source: *Advisor Value Propositions: How Advisors Showcase Their Value to Investors—and What Investors Secretly Think*, BNY Mellon Pershing, 2018

And Trust Could Be a Lot Better

WHICH OF THE FOLLOWING TYPES OF PEOPLE DO YOU CONSIDER TO BE MORE TRUSTWORTHY? (RETAIL INVESTORS)

- High (ranked 1 or 2)
- Medium (ranked 3 or 4)
- Low (ranked 5 or 6)



Source: *Earning Investors' Trust How the Desire for Information, Innovation, and Influence Is Shaping Client Relationships*, CFA Institute, 2020

What Sets You Apart from Other Advisors

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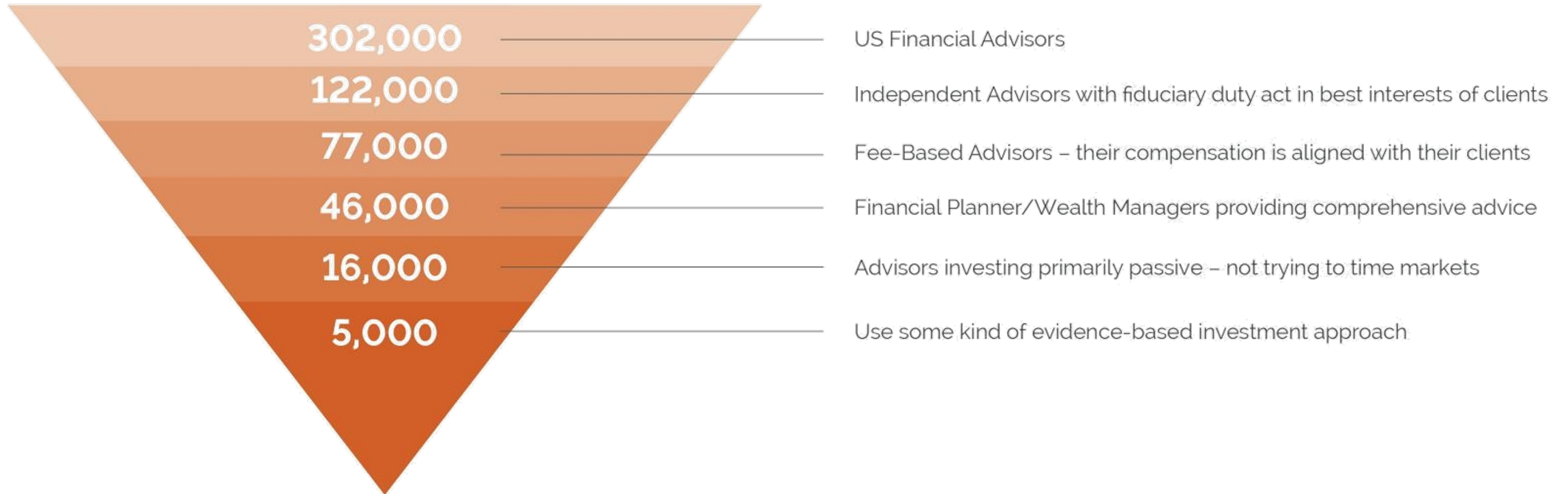
Source: Financial Planning Association, Research and Practice Institute, 2016
Trends in Practice Management: Defining and Communicating Your Value

Barron's Top 100 Advisors' Websites



Source: Advisor Value Propositions: How Advisors Showcase Their Value to Investors—and What Investors Secretly Think, BNY Mellon Pershing, 201

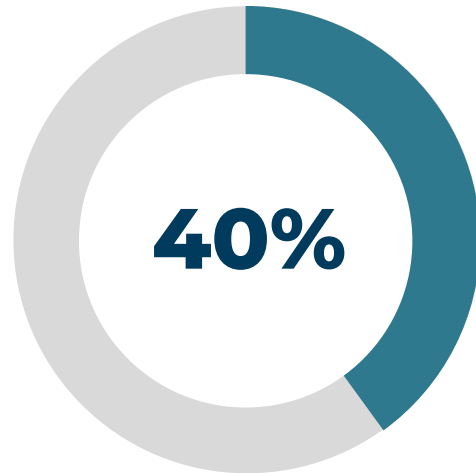
How You Are Different



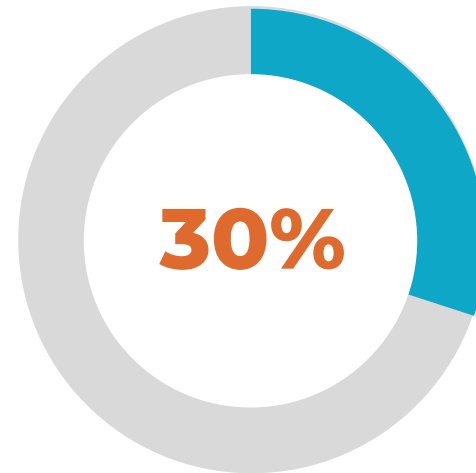
Source: Investnet Compendium of Industry Trends - April 2015

The Value of Articulating Your Value

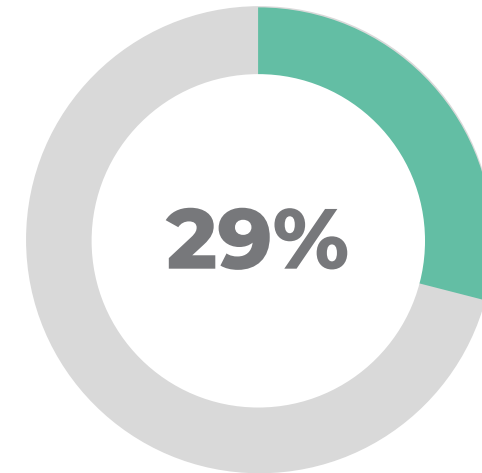
Advisors with a Mission/Value Proposition...



Higher asset growth
over past two years



Lower
client
turnover



More
clients

Source: DFA 2014 Benchmarking Survey

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And Know Who You Want to Help

Firms with a documented **ideal client persona** & **client value proposition** attracted more **new clients** and **assets** in 2019



Source: 2020 RIA Benchmarking Study from Charles Schwab

How You Describe Yourself is How Others Will Describe You

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A mission statement /value proposition succinctly describes:

- What you do
- Who you do it for, and
- The value you provide

Tell me
more

Earn the next conversation

Principles for Great Mission Statements

- A great mission statement. . .
- Has to reflect
 - who you are
 - what you do
 - who you serve
 - outcomes you provide
- Is short and succinct
- Uses everyday language
- Transparent (no secret sauce)
- Earns next conversation

...ly managed portfolio is tailored to the needs of our client. It's a strategic approach that utilizes our considerable experience navigating financial markets, encourages creative solutions, and adapts to changes in the lives of our clients.

Our Retirement Services team helps employers craft retirement plan programs that result in an outstanding employee benefit. We are a partner where business owners rely on us to ease the administrative process associated with a retirement plan. Our unique approach to advice and education helps participants with any level of investment knowledge understand successful saving and investing concepts that will enable them to retire ready.

Our Mission

Our mission is to help you reach your highest financial potential....So you can enjoy the rich experiences of family, friendships, business, and career.

Enter keywords



Book a Meeting

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Get in Touch

11300 Cantrell Rd, Suite 200, Little Rock, Arkansas 72212 United States
501-663-7055 | Info@MeridianIA.com

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COMPASS

INVESTMENT ADVISORS, LLC

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Our Mission, Vision & Values

We are committed to maintaining the highest standards of integrity and professionalism in our relationship with you, our client. We endeavor to know and understand your financial situation and to provide you with quality information, services, and products that will help you work towards your goals.

Contact Us

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Phone:
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(843) 376-5540

Bryan@MyInvestingAdvisor.com

Chrys@MyInvestingAdvisor.com

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Our Mission

At West Advisory Group, we have made a commitment to providing excellence in everything we do for our clients. Our goal is to exceed expectations at all times by honoring you with a paramount degree of customer service. We serve you with years of experience and skill which have provided us with a wealth of knowledge regarding the financial industry. When you choose our financial planning services, you benefit from obtaining comprehensive advice from a team of highly qualified professionals and individuals with an extensive background in addressing your particular financial needs. As an independent financial planning firm, we solely represent our clients, their needs, and interests, rather than any specific company's. While some financial institutions recommend investment products that are manufactured by the parent of the subsidiary business entities, we have no such ties. Our self-sufficiency is vital to delivering nonpartisan and unbiased recommendations. Due to our independence and objectivity, it allows us to provide our clients with the commitment that they deserve.



Upcoming Events

Retirement Planning Today, Two-Day Class

The course is designed to teach you how to help build wealth and align your money with your values to accomplish your goals in life. Part 2 of 2.

October 13, 2015

Retirement Planning Today, Two-Day Class

The course is designed to teach you how to help build wealth and align your money with your values to accomplish your goals in life. Part 1 of 2.

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Home
welcome

Our Process
what we do

Your Portfolio
meeting your goals

Working Together
your team of experts

About Us
who we are



At Charleston Investment Advisors we are committed to helping our clients make smart decisions about their wealth so that it can do as much good as possible.

A great mission statement. . .

- ✓ Has to reflect
 - ✓ who you are
 - ✓ what you do
 - ✗ who you serve
 - ✓ outcomes you provide
- ✓ Is short and succinct
- ✓ Transparent (no secret sauce)
- ✓ Uses every day language
- ✓ Earns next conversation

Our Mission

Our Mission to Deliver

Velocity Advisors is a financial services firm committed to providing a client-centric experience delivered by local and knowledgeable financial professionals. We are here to provide families, individuals and business with the financial protection and services to meet their financial needs through education, empowering them to make solid financial decisions.

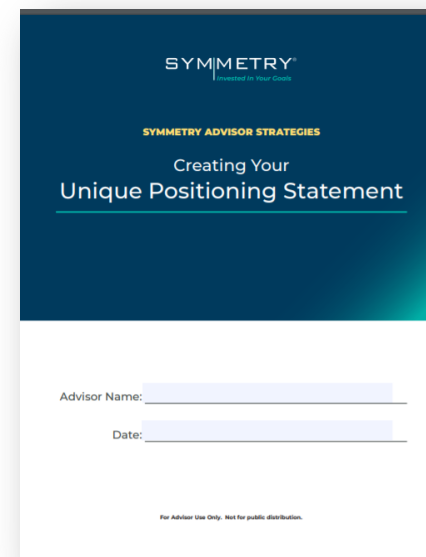
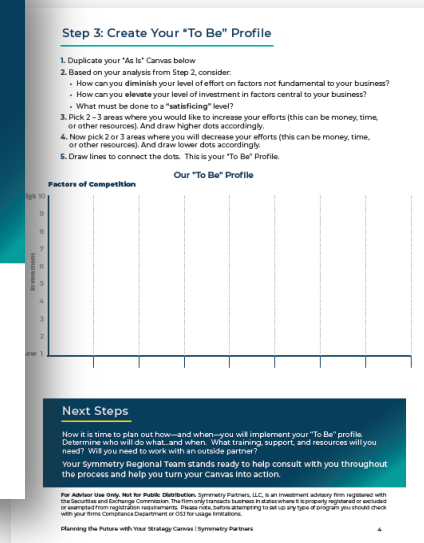
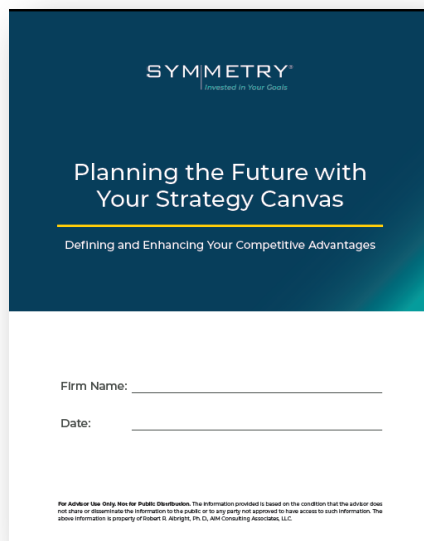
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Additional Differentiation Resources

Strategy Canvas & Positioning Workbook

- How do you define your **competitive advantage** and decide where best to spend time and resources?
- What makes you **different from the competition**?
- What is your **unique value**?



4. How Do You Effectively Communicate?



- Does everything you do and say reflect :
 - Who you serve
 - What you provide
 - Your unique value/mission

WHY Should Clients Work with You? HOW are You Different?

Exercise 3

I am a

What do you call yourself?

who serves

Who do you serve?

by providing

What do you do for your clients?

because I want to

What outcomes do you want to achieve?

I believe my clients value

How are you different than others?

Your Current Mission/Value Statement

Does your current mission/value statement reflect who you want to serve today/in the future?

Yes No

List any changes you want to make to your current mission/value statement:

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Every Expression Defines Who You Are



Survey Says..

- 98% say a website is somewhat or very important when choosing an advisor
- 65% cited age, experience, and credentials as a top consideration when choosing an advisor.
- 64% said their ability to provide personalized advice was a top consideration.
- 68% said lack of clarity when it comes to fees, compliance and other issues would cause them to hesitate to reach out to an advisor.
- 56% said not having enough information to make a decision would cause them to hesitate to reach out.
- 52% said a lack of trust in financial advisors or institutions would cause them to hesitate to reach out.

Source: 2020 eMoney Consumer Marketing Survey, September 2020

Advisor Believe Communication is Critical

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Keys to nurturing new and existing client relationships



Regular communication



54%



Get to know clients on a personal level



50%



Proactive outreach during market turbulence / notable market events



43%



Regular review of financial plan



41%



Build relationships with clients' families



35%

Source: Natixis Investment Managers 2020 Global Survey of Financial Professional

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Clients And Advisors Have Different Ideas About What Is Most Important To Clients

Most Valuable	Clients Say	Advisors Say
1	Helps me reach my financial goals	Understands me and my unique needs
2	Has the relevant skills and knowledge	Helps me reach my financial goals
3	Communicates and explains financial concepts well	Keeps my interests in focus with unbiased advice
4	Can help me maximize my returns	Communicates and explains financial concepts well
5	Has a good reputation and positive reviews	Has the relevant skills and knowledge

Since the Start of the Pandemic

SYMMETRY[®]

- *28% of Investors feel more positive about their advisor*
- *26% are now questioning who they're with*
- *8% are now unhappy with their advisor*
- *38% do not report a change*

Source: AssetMark's American Financial Experience Survey, conducted online August 23-24, 2020.

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Two Wealth Management Firms

Firm A



Firm B



Codorus Valley Financial Advisors, Inc.

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Thank you for referring others to our office,
your expression of confidence is sincerely appreciated.

Newsletters

The Roundabout Way to a Roth IRA

A 2014 IRS ruling makes it easier for taxpayers to move after-tax 401(k) contributions directly to a Roth IRA.

Growth, Value, or Both?

Here's how to identify a stock or mutual fund as a growth or value investment.

Clue for Homeowners: Filing a Claim Could

Calculators

Tax-Deferred Savings

Compare the potential future value of tax-deferred investments to that of taxable investments.

Cost of Retirement

Use this calculator to estimate how much income and savings you may need in retirement.

Required Minimum Distributions

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Learning Center

Market Watch

Last Closing Prices

Dow Jones Industrials 17,084.49 +0.20

Nasdaq Composite 4,830.47 +0.41

NYSE Composite 10,361.27 +0.00

Enter stock ticker symbol:

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Market data delayed per exchange rules.

All quotes are in US Eastern Time (EST).

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[Map and Directions](#)

60+

Combined years in the business

\$34k

Given Back to the Community

\$177M+

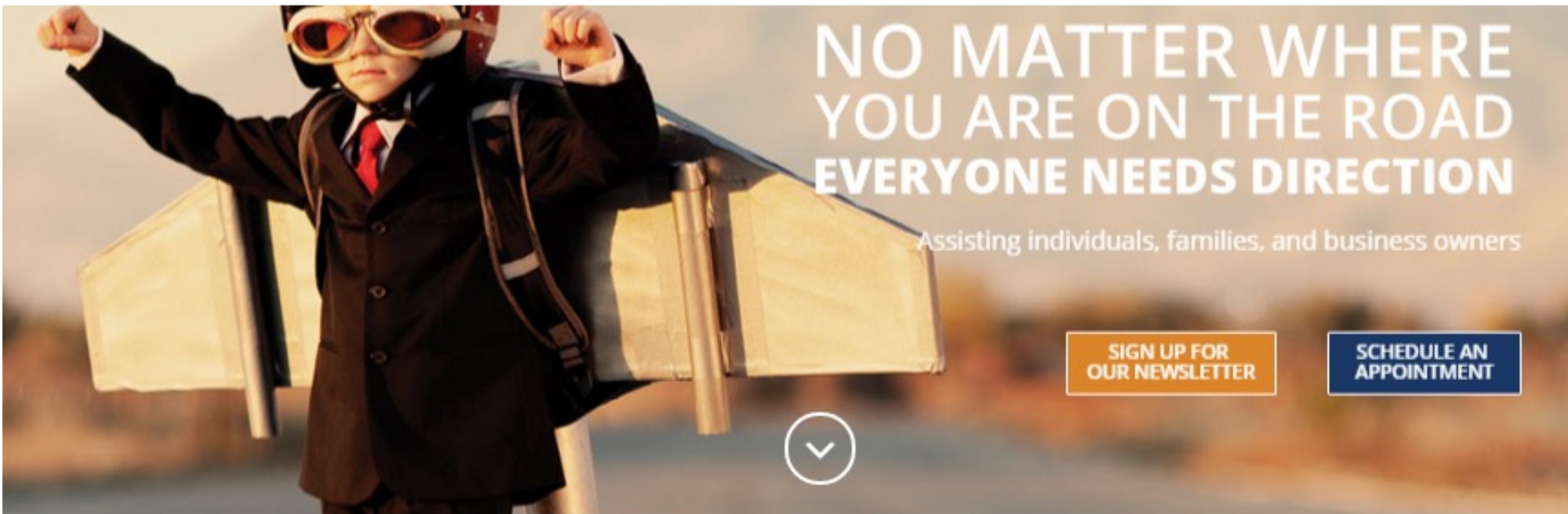
Assets Under Management*

*As of 2/28/2022





YOU DESERVE YOUR OWN FINANCIAL LEGACY

At Axis Wealth Partners, our commitment to you is guided by our expertise and personal experiences. We provide caring, comprehensive advice to individuals and families interested in building and preserving their wealth. Regardless of which stage of transition in life you may be living, we believe sound, transparent financial advice begins with empathy and understanding. We know the value and power of our advice because we live it.





WHY ATLAS

-  Your Personal Wealth Advocate
-  No Minimums, No Sales
-  Financial Planning For An Affordable Fee
-  Investment Advice You Can Understand
-  CPAs You Can Trust

Whether you're just getting started or have sophisticated wealth planning needs, Atlas provides independent, unbiased advice along the way.

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Mesa Financial Group, LLC is a Fee Only, Independent, Comprehensive Wealth Management Firm providing Individuals and Families a Simple, Clear, and Secure Wealth Management Experience.

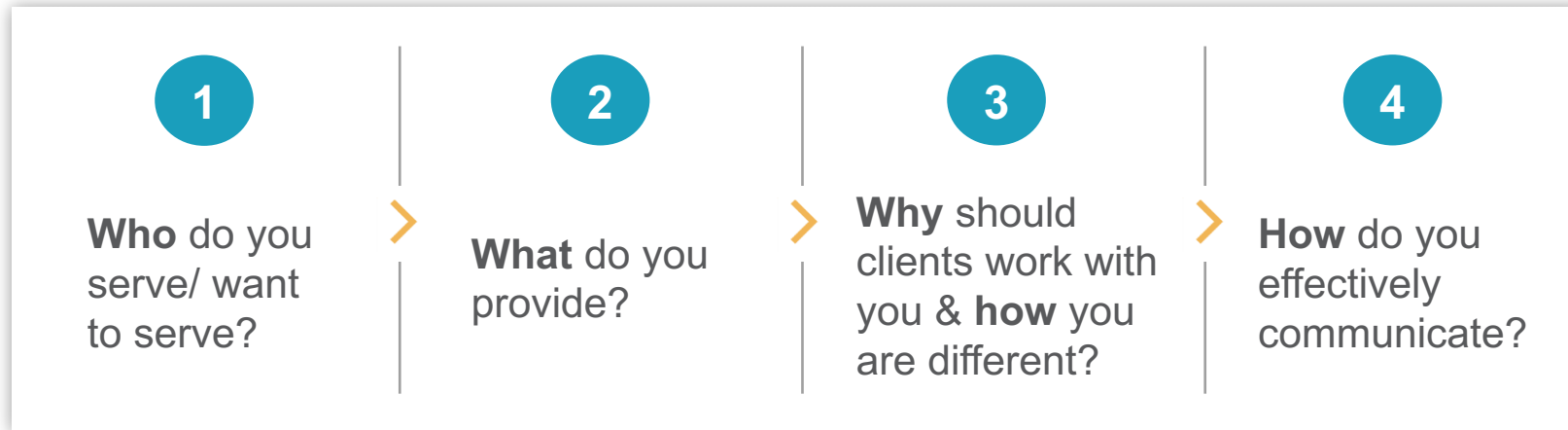


Simple

Clear

Secure

Putting It All Together...



Focused companies tend to be more profitable

You build loyalty & deeper relationships when your offering matches your ideal clients

People don't buy what you do. They buy why you do it

Your E2E experience needs to be cohesive and aligned to ideal clients and preferences

1-Page Growth Plan

WHO do you serve/want to serve?

Exercise 1

WHAT do you provide?

Exercise 2

WHY should clients work with you? HOW are you different?

Exercise 3

Growth Goals (should be measurable and specific, with a target completion date)

Goal 1: Date:	Goal 2: Date:	Goal 3: Date:
Strategy A:	Strategy A:	Strategy A:
Steps to Take:	Steps to Take:	Steps to Take:
Strategy B:	Strategy B:	Strategy B:
Steps to Take:	Steps to Take:	Steps to Take:

A Sample Plan for Growth

Goal 1: Bring on 10 New Ideal Clients
Date: December 31, 2021

Strategy A: Generate 5 leads a month from my website

Steps to Take:

- Create two offers in rotation: Whitepaper & retirement checklist
- Add mission statement
- Add section on fees
- Rewrite content on services to make it more client friendly
- Create pages for my niches

Strategy B: Earn 2 Referrals a month from Clients

Steps to Take:

- Identify 12 Clients I want to clone, schedule 1-on-1 sessions Educate all clients in annual reviews on services I provide
- Source 24 potential prospects via client LinkedIn connections
- Provide Volatility Checklist to all clients and suggest they share with friends/colleagues

SYMMETRY ADVISOR STRATEGIES SYMMETRY[®]

1-Page Growth Plan

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Exercise 1

WHAT do you provide?
Exercise 2

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Goal 1: Date:	Goal 2: Date:	Goal 3: Date:
Strategy A:	Strategy A:	Strategy A:
Steps to Take:	Steps to Take:	Steps to Take:
Strategy B:	Strategy B:	Strategy B:
Steps to Take:	Steps to Take:	Steps to Take:

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Thank You



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Phone: 860.384.8140

"Scrappy," the Symmetry bull is a symbol of our firm's belief in the long-term power of markets.

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