



# Growth Strategies for Planning in the New Year

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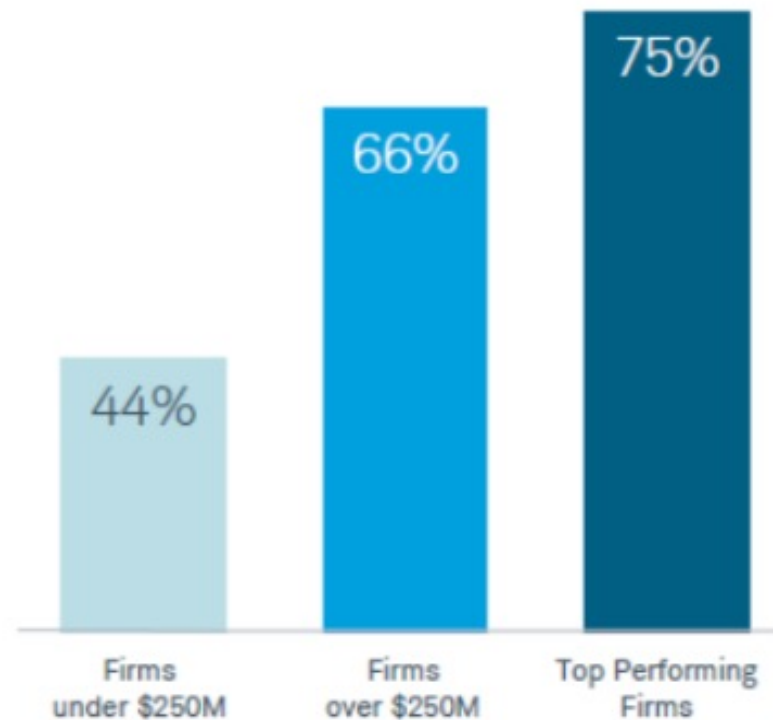
Presented by:

J. William G. Chettle & Andrea Loin  
Symmetry Partners, LLC

# The Power of a Plan

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



Source: 2020 RIA Benchmarking Study from Charles Schwab

# Two Key Planning Tools

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SYMMETRY<sup>®</sup>

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*Invested In Your Goals*

## Planning the Future with Your Strategy Canvas

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Defining and Enhancing Your Competitive Advantages

Firm Name: \_\_\_\_\_

Date: \_\_\_\_\_

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SYMMETRY ADVISOR STRATEGIES

## Growth Plan

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Practice: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

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# The Strategy Canvas

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## Planning the Future with Your Strategy Canvas

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Defining and Enhancing Your Competitive Advantages

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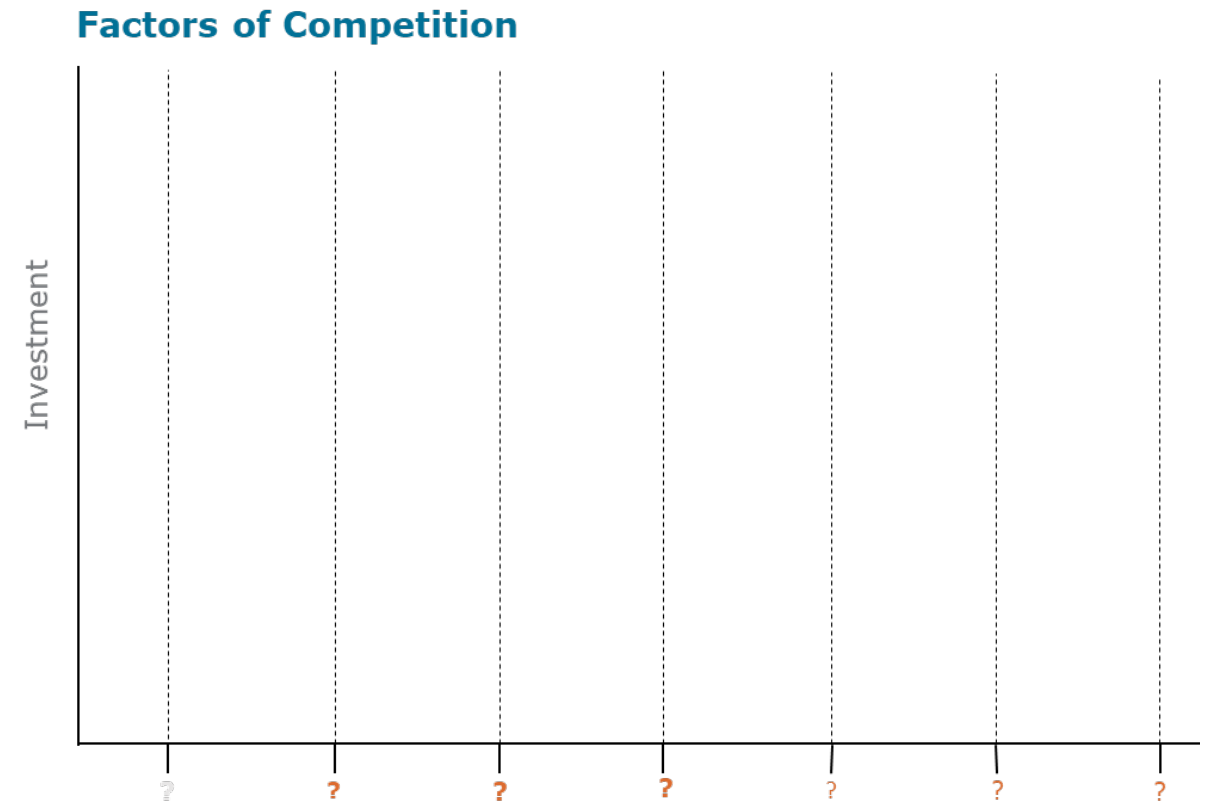
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# Strategy Canvas—3 Things in 1 Picture

1. Shows strategic profile of an industry by clearly depicting factors that affect competition
2. Shows strategic profiles of the competitors — which factors “they” invest in
3. Displays your company’s strategic profile or value curve — showing how you invest in factors of competition

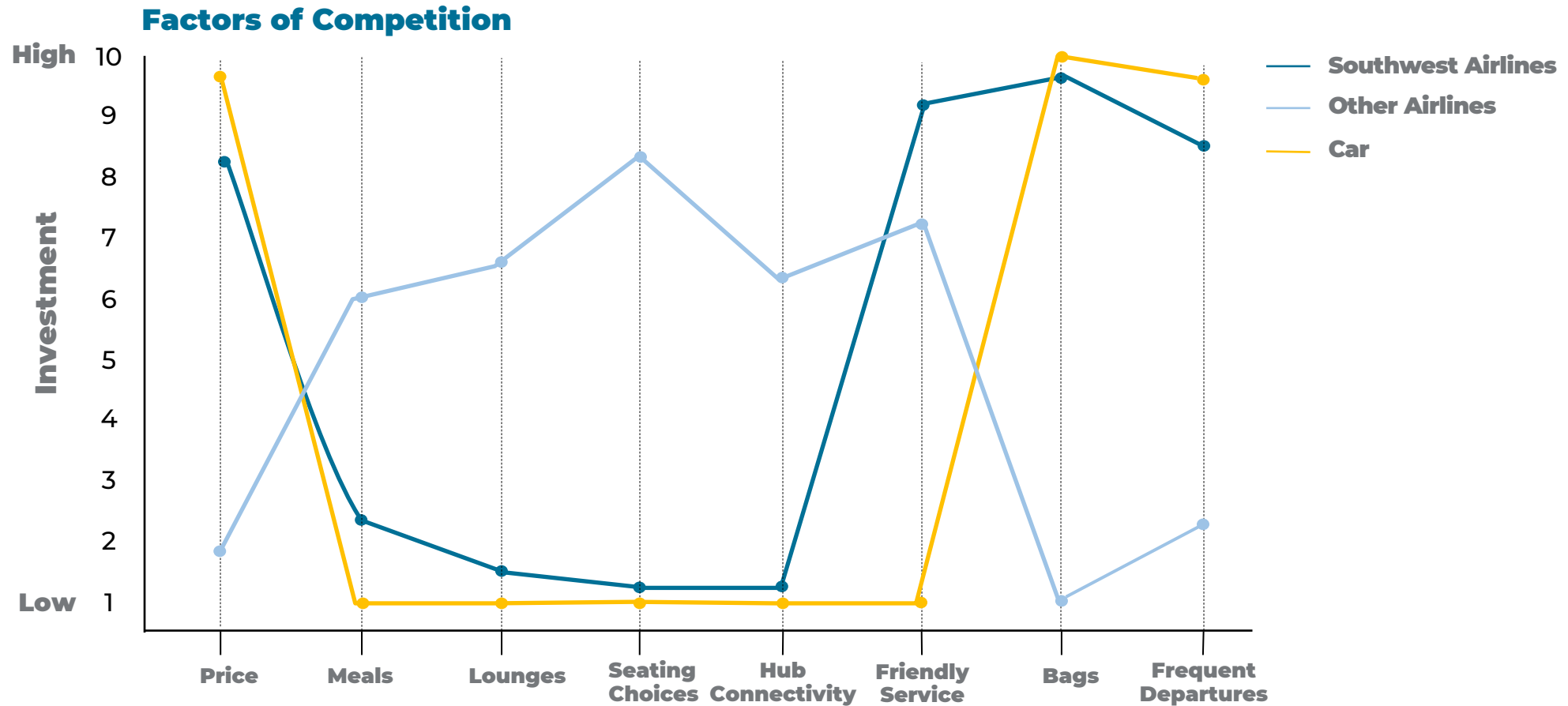
# Understanding the Canvas

- **X Axis:** Shows **factors of competition** for the industry
- **Y Axis:** Indicates competitors' **investment** in a factor
  - Low position means a company invests less, and thus offers less, in that factor



# Southwest Airlines Strategic Profile

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Southwest Airlines. 2023

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# Major Factors of Competition for Financial Advisors

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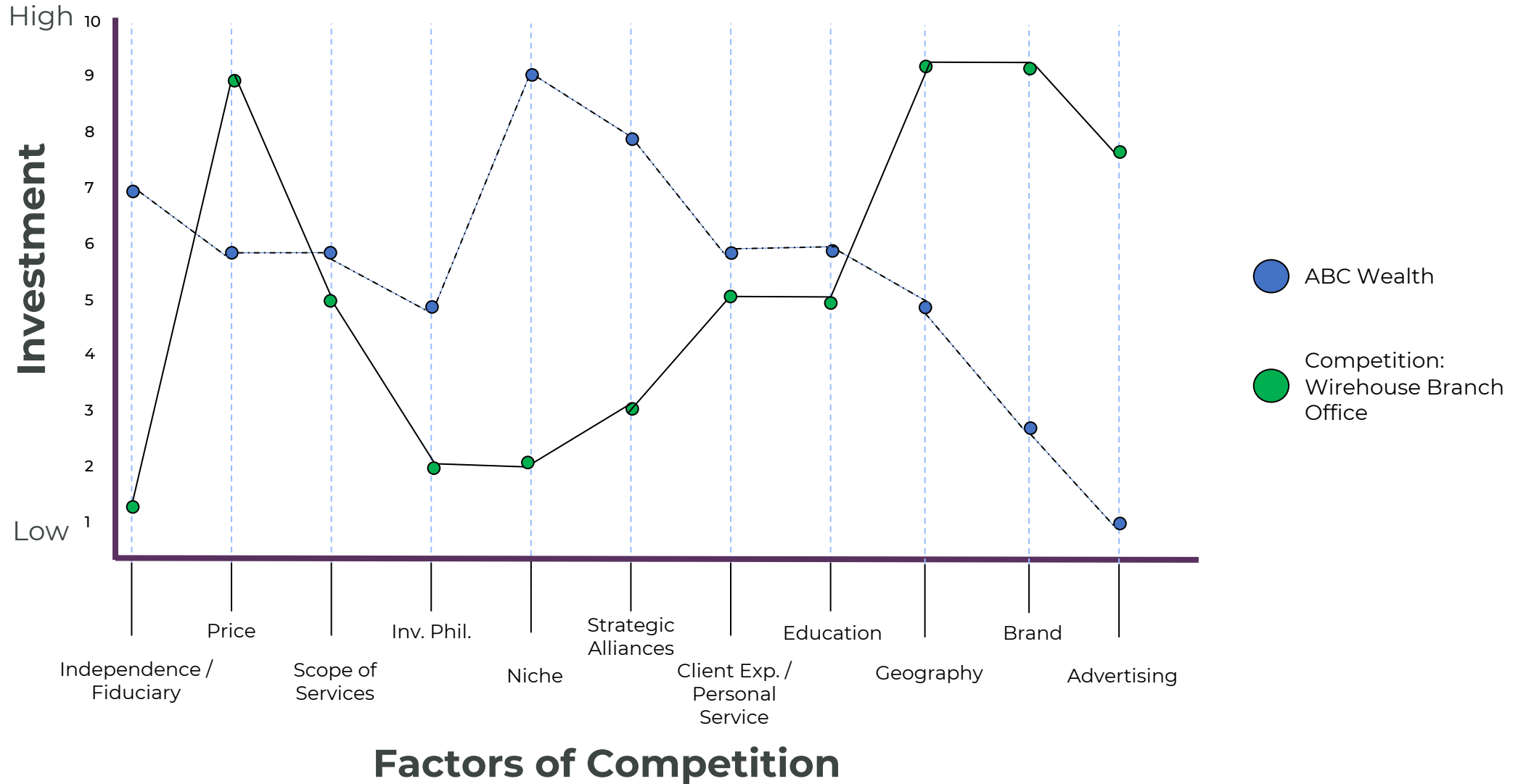


# Financial Advisor Factors of Competition

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- Independence
- Cost (fees, etc.)
- Breadth of Services
- Investment Philosophy
- Client Experience
- Client Education
- Advisor Education
- Business Process Effectiveness  
(e.g. systematic communications, web-based sales solutions, point of sale materials, account reporting, operations support)

# ABC Wealth Strategic Profile – “Today”



# Invest & De-Invest: Key Questions

- How can you **diminish** your level of effort on factors not fundamental to your business?
- How can you **elevate** your level of investment in factors central to your business?
- What must be done to a “**satisficing**” level?

# Essentials of a Good Strategy

## 3 Complementary Qualities

### 1. **Focus**

We believe every great strategy has focus –your profile should clearly show it.

Perhaps concentrate on just three factors...

***If everything is important then nothing is important!***

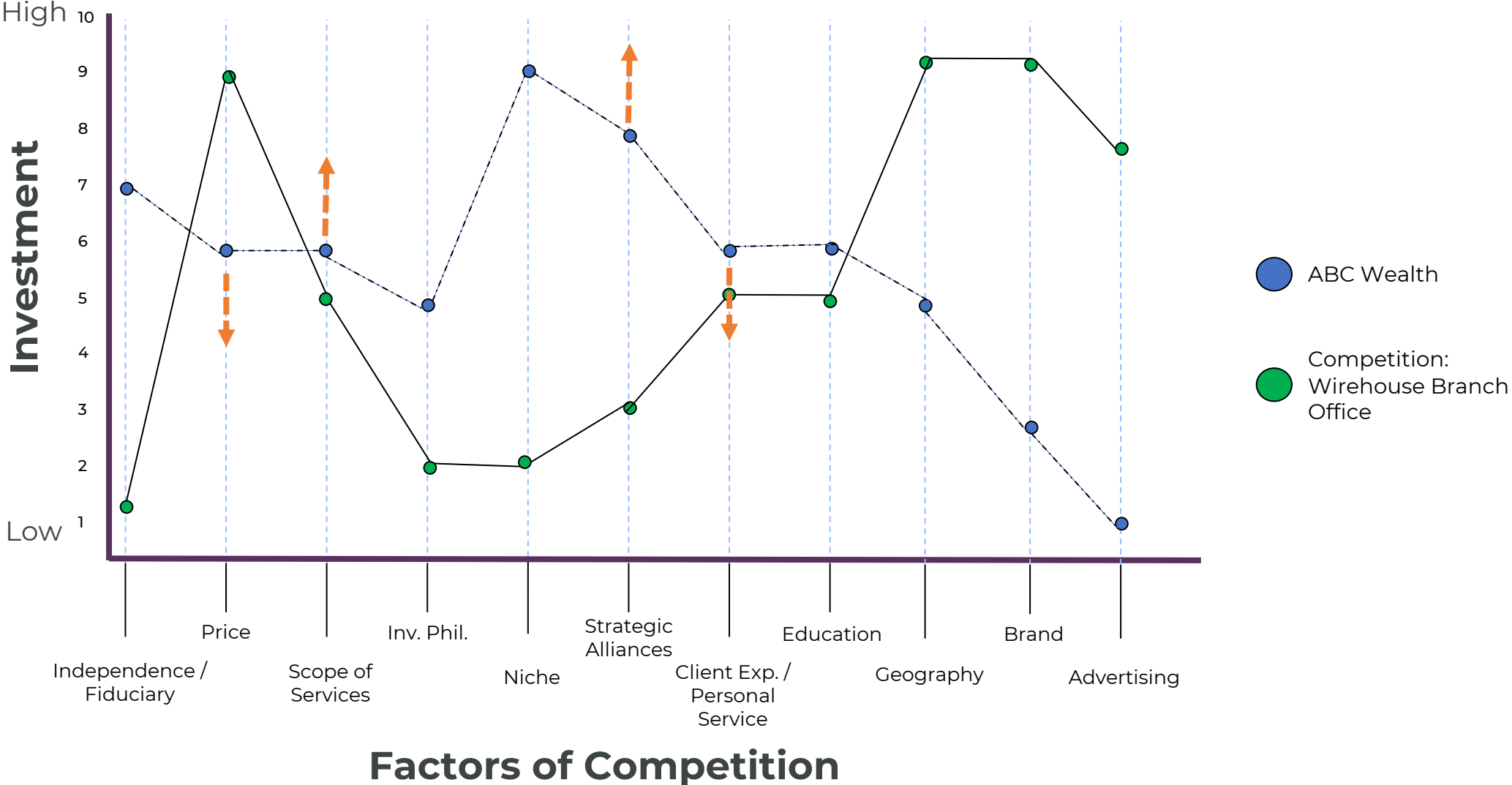
### 2. **Divergence**

Does your profile stand apart? If not, you may be acting reactively and trying to keep up with the competition

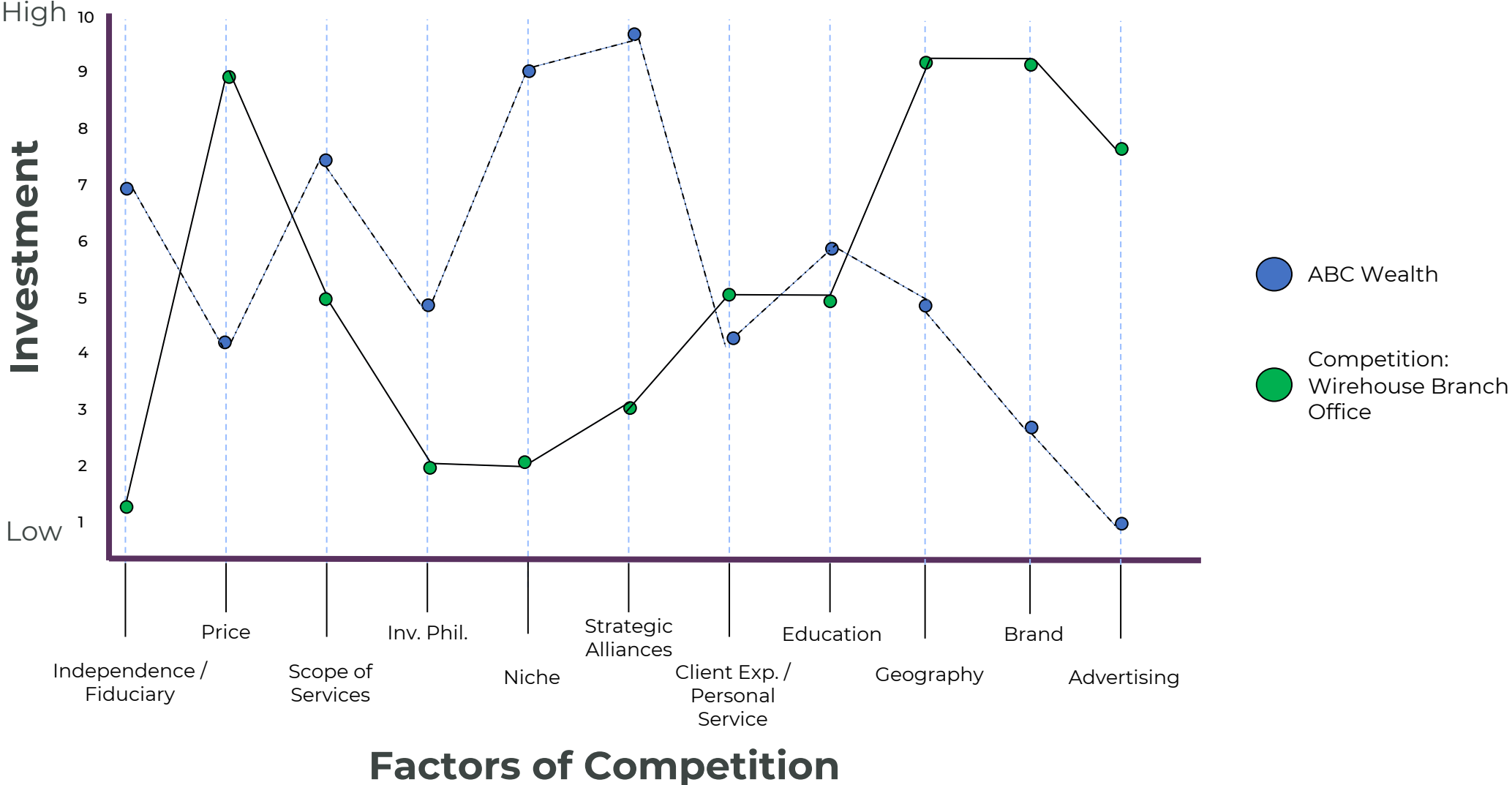
### 3. **Memorable**

The Profile lends itself to a good “tag line”

# ABC Wealth Strategic Profile – “To-Be”



# ABC Wealth Strategic Profile – “To-Be”



# Implications of the Strategy Canvas

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## Areas of Focus

- **Price** – provides a great deal of service from both a college planning and financial planning standpoint. Financial planning fees and investment management fees are aligned with industry averages, however, the fee for college planning is lower than industry averages.
- **Scope of Services** – Firm delivers a robust suite of services to the families they work with. With the focus on college planning, some clients only see this part of the total value proposition. Advisor would like to break this mold and focus his messaging on the totality of the value he is able to offer.
- **Strategic Alliances** – Firm has started creating strategic alliances with other firms in the college planning space. These alliances provide revenue generating opportunities as well as scale and referrals. Advisor should continue to foster and capitalize these relationships.
- **Client Experience / Personal Service** – Personal care is paramount to the client experience created by Firm. Much of the time spent on planning is performed behind the scenes, whereas the true advisory value shows through direct client engagement. Firm should identify ways to automate the college planning process, like their financial planning process, to allow Advisor to divest from the non-client facing duties and focus on client facing activities.

# The Strategy Canvas

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## Planning the Future with Your Strategy Canvas

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Defining and Enhancing Your Competitive Advantages

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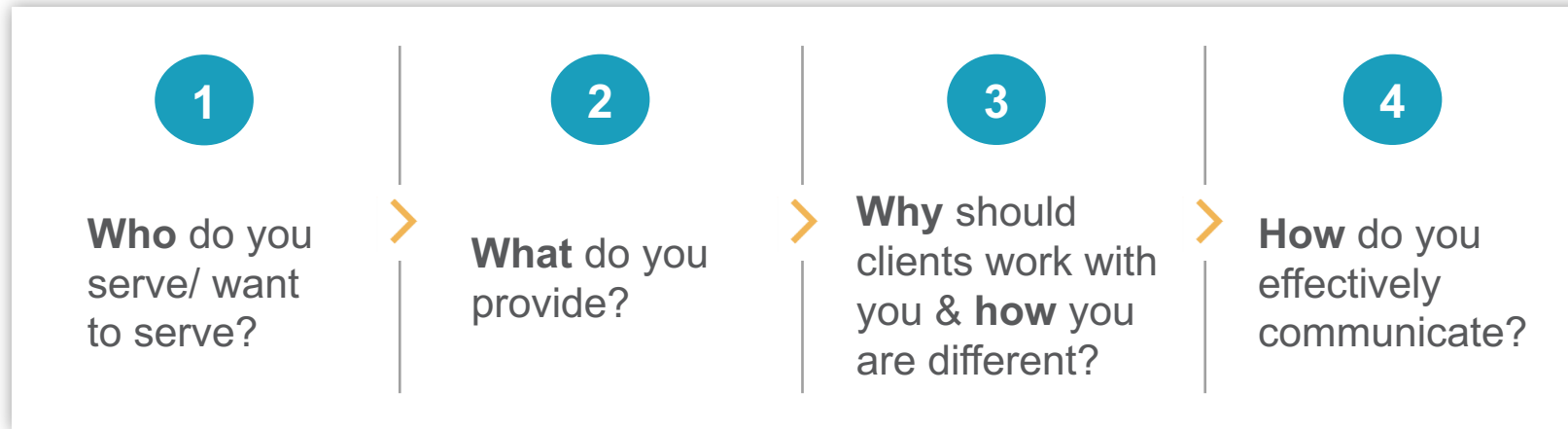
# The Growth Plan

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The image shows the front cover of a document titled 'Growth Plan'. The top half of the cover has a dark blue background with the SYMMETRY logo at the top center, which includes the tagline 'Invested In Your Goals'. Below the logo, the text 'SYMMETRY ADVISOR STRATEGIES' is written in a smaller, yellow font. The main title 'Growth Plan' is prominently displayed in a large, white font and is underlined with a thin teal line. The bottom half of the cover is white and contains three horizontal lines for input, each preceded by a label: 'Practice:', 'Name:', and 'Date:'. At the very bottom of the white section, there is a small, dark grey disclaimer: 'For Advisor Use Only. Not for public distribution.'

# 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

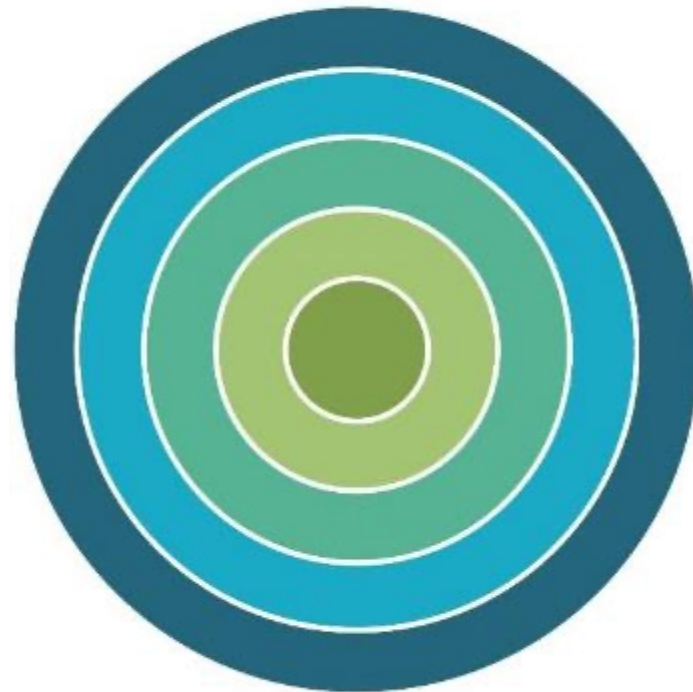
Want to Serve

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# The Power of Focus

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You May See the Results You Want to Achieve



- Pre-Retirees
- Aged 50-60
- Tech Executives
- With >\$1m to Invest
- Within 100 mile radius



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A firm dedicated to providing sound, fundamental financial advice designed to satisfy your unique goals.

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### Our Process

Wealth management requires a multi-tiered strategy. By understanding every facet of your financial goals, we develop a plan that meets your expectations while providing long-term peace of mind.

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*financial advisors*



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Our specialty is financial planning and investment management for you, Gen X & Gen Y physicians and your family. Together, we will navigate the complexity of everyday life by crafting a streamlined financial plan that is agile for your evolving needs. We will help you utilize your wealth to free up time and energy to focus on your family, your practice, and what you love most.

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Home > Veterinary Medicine

## Veterinary Medicine

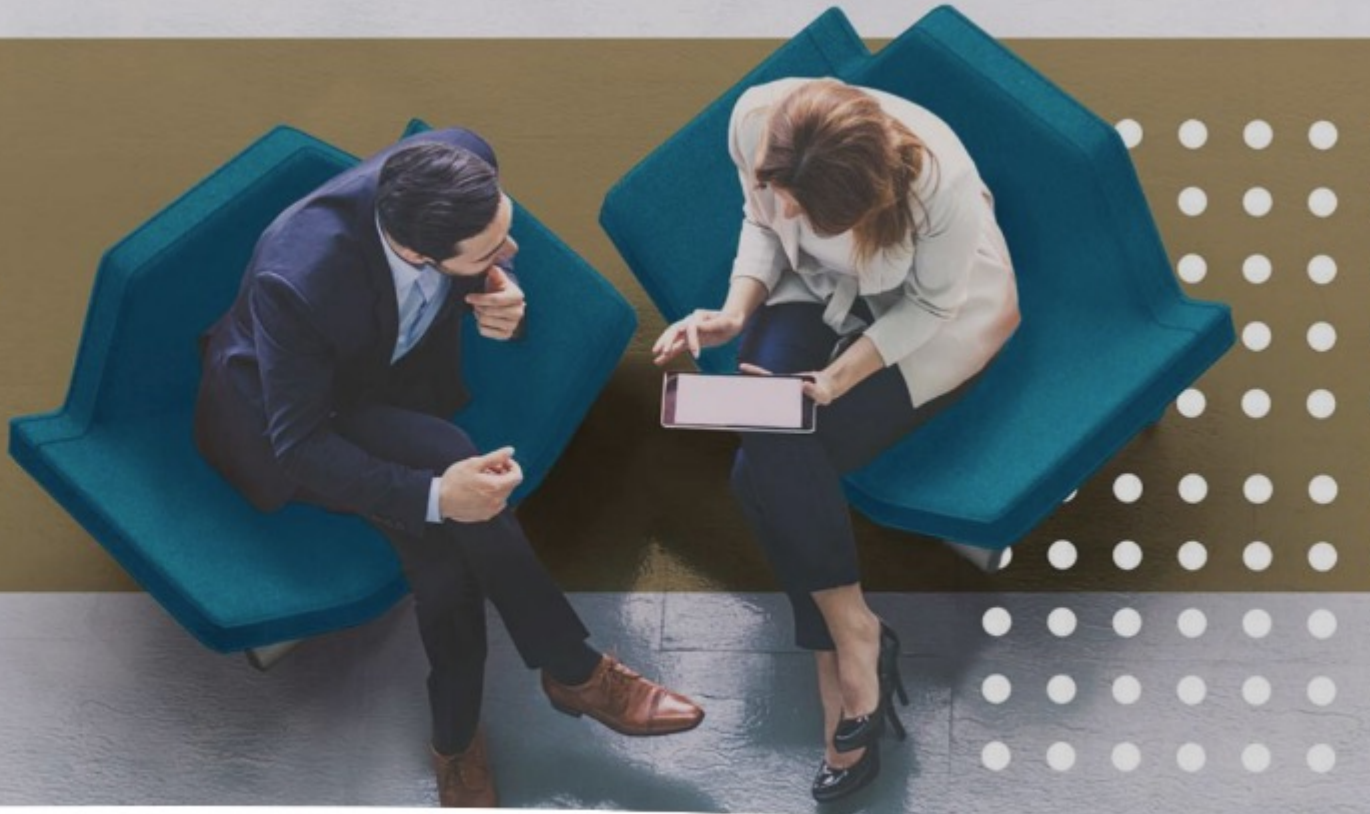


For more than 25 years, Burzenski & Company has been skillfully providing financial management and tax planning services for veterinary practices and their owners. As veterinary accountants, our customized and personal approach to

"Veterinarians enjoy medicine and animals but don't necessarily enjoy the business aspects of their practice. That is where we fit in. Caring for animals is your specialty

# MERIT WEALTH

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





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## *Excellent Financial Advice for Everyone*

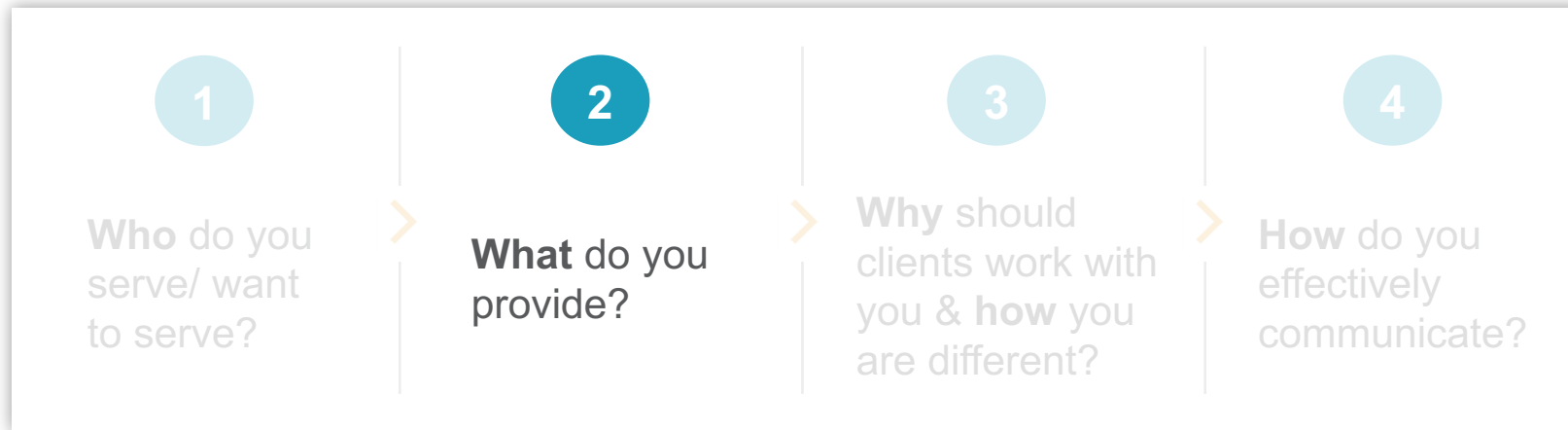
After scrimping and saving most of your life, you're getting close – you're thinking a lot about when you can retire. This can be an exciting thought, but also pretty scary. It's around this time in your life that you start to realize:

- 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**

## 2. What Do You Provide?

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



## 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

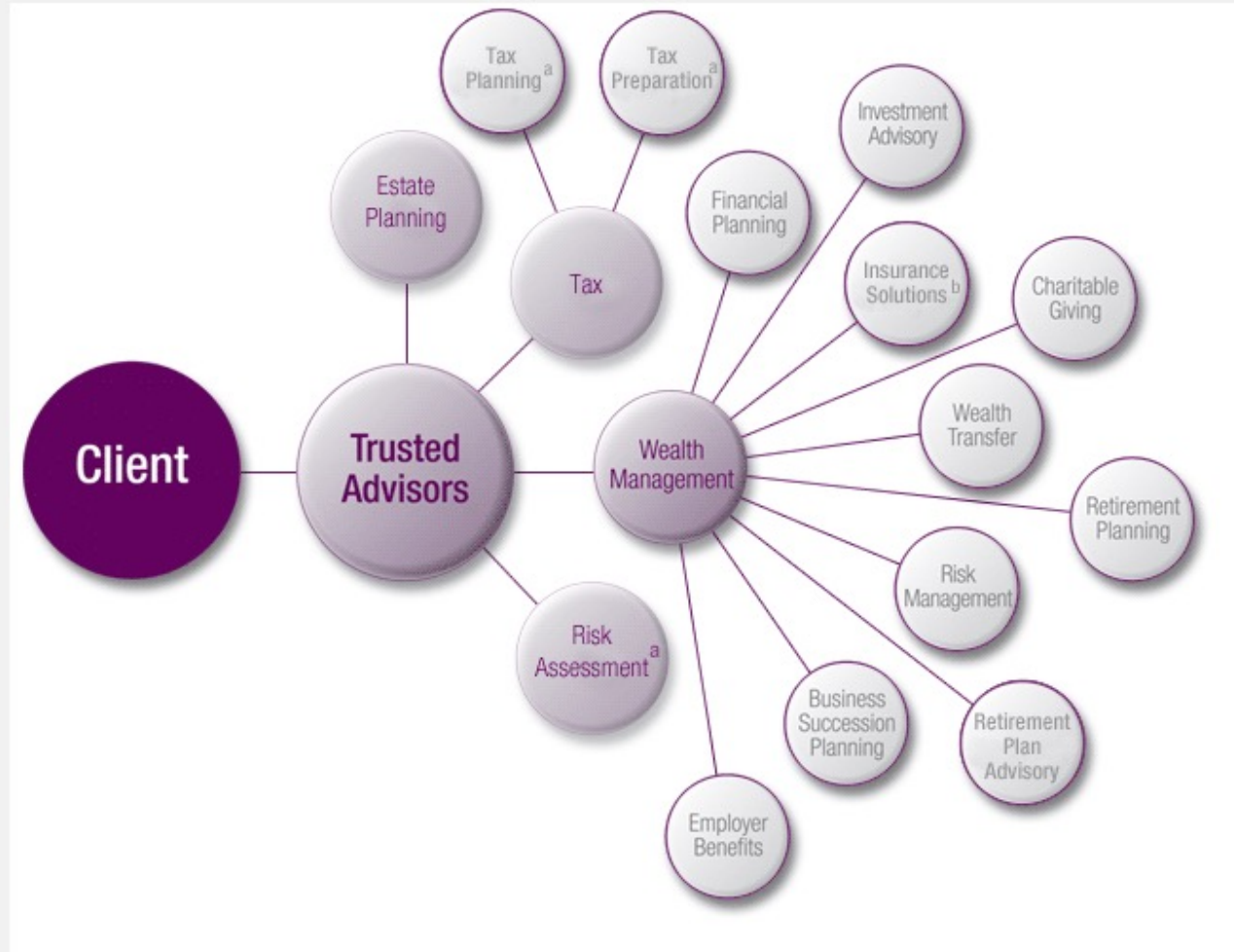
### Insurance

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



Retirement Planning  
Risk Management  
Retirement Plan Advisory  
Business Succession Planning  
Employer Benefits










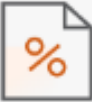

People and locations



# Are You Focused on Helping Clients?

Or are you focused on selling products?



 <p>Vision →</p>	 <p>Business →</p>	 <p>Legacy →</p>	 <p>Education →</p>
 <p>Retirement →</p>	 <p>? →</p>	 <p>Philanthropy →</p>	 <p>Family &amp; Lifestyle →</p>
 <p>Health →</p>	 <p>Minimizing Taxes →</p>	 <p>Protecting Against the Unexpected →</p>	<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> <p>←</p>



# Breathe Easier® About Your Financial Future

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

GET STARTED NOW!



## What Do You Provide?

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### 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**
- Making sure clients have secure, regular income in retirement through **retirement income planning**
- 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

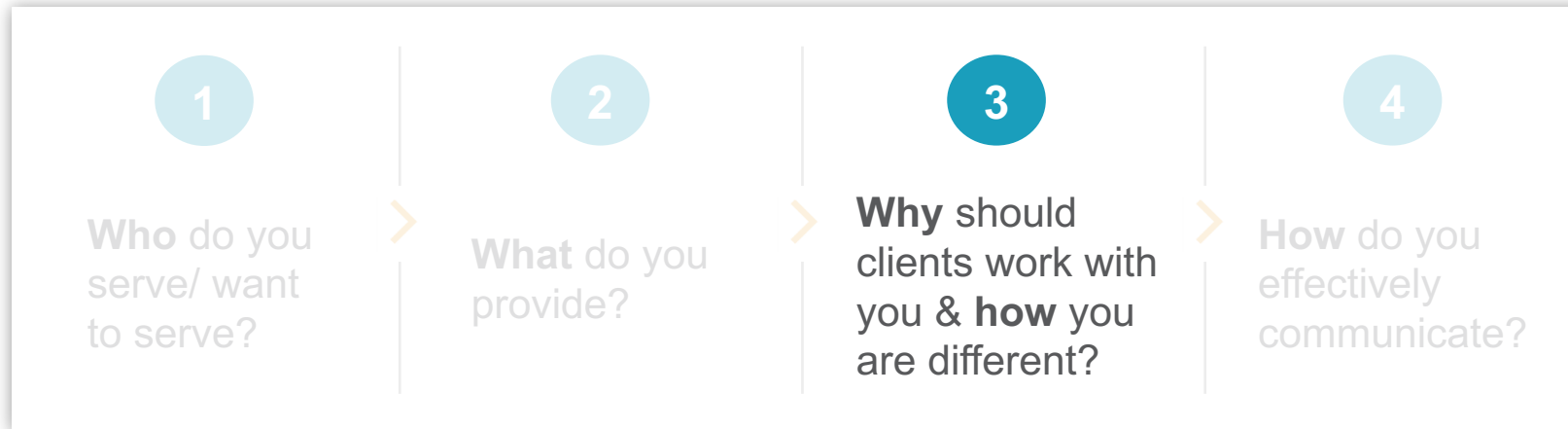
Do you regularly discuss the services (or products) you provide?

Yes  No

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

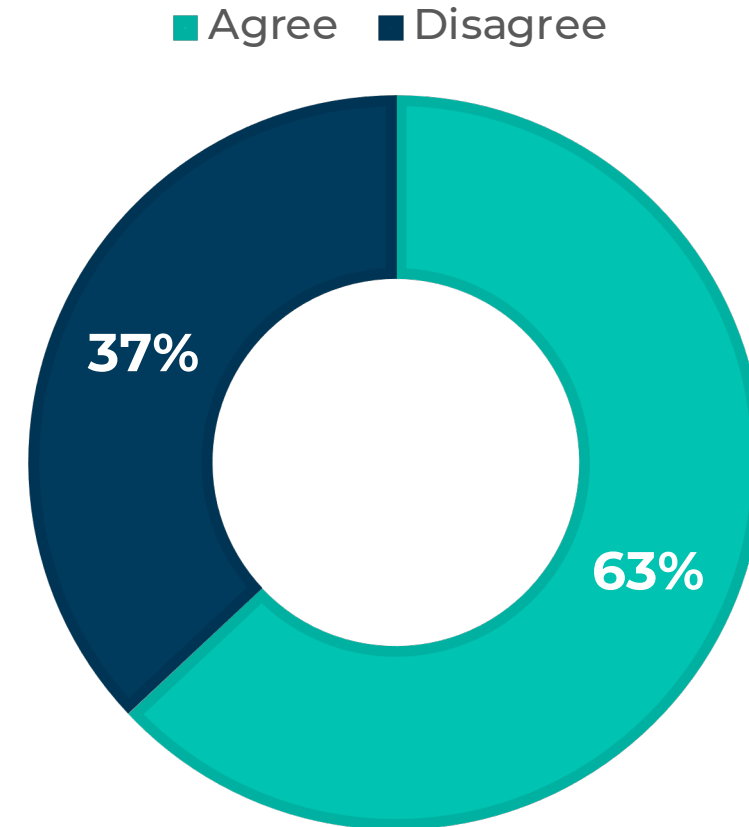
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- What makes YOU compelling?
- What do your clients value about you?
- What is your mission/value?

# 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

# What Sets You Apart from Other Advisors



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





# 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

# 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)

Tell me more

Earn the 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

## Stay Connected



## Get in Touch

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## 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



## 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.

#### A great mission statement. . .

- Has to reflect
  - who you are
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**Essential Advisory Services is a**  
*Modern Family Office* **that empowers our**  
**clients to succeed in every aspect of their**  
**financial lives**

#### A great mission statement. . .

- ✓ Has to reflect
  - ✓ who you are
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  - ✓ outcomes you provide
- ✓ Is short and succinct
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- ✓ Uses every day language
- ✓ Earns next conversation

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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# 4. How Do You Effectively Communicate?



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



# Every Expression Defines Who You Are





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Sign In

My Cart

CRAFT

COFFEE

TEA

GIFTS

SUBSCRIPTIONS

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# How Affluent Search for Financial Advisors

SYMMETRY<sup>®</sup>

	<b>&lt;45</b>	<b>45-65</b>	<b>&gt;65</b>
<b>Ask family/friends for recommendations</b>	39%	46%	45%
<b>Ask another professional for recommendations</b>	13%	21%	34%
<b>Search online</b>	43%	27%	10%
<b>None of the above</b>	5%	6%	11%

Source: Oeschli .com study of Investors with a minimum of \$500K, 2019

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# What the Data Tell Us...

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## Affluent Investor Perspective on Advisor Websites

- **98%** say a website is somewhat/very important when choosing an advisor
- **68%** said lack of clarity on fees, compliance and other issues would cause them to hesitate to contact advisor
- **65%** cited age, experience, and credentials as a top consideration when choosing an advisor
- **56%** said not having enough information to make a decision would cause them to hesitate to reach out

Source: 2020 eMoney Consumer Marketing Survey, September 2020



## No Cash, No Checks, No Problem

Peer-to-peer payment apps are one of the newest ways to send money.

[Learn More](#)





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

# Social Media's Growing Impact

- **50% of investors** say social media impacts whom they hire as a financial professional
- **20% of investors** said that an Advisor's social media was the **sole deciding factor** in their decision-making process



# LinkedIn - Get Your Profile Right

Home Profile My Network Jobs Interests Business Services Try Premium for free

House Flipping Workshop - Learn From House Flipping Pro Than Merrill Richmond 9/21-9/24 | [Read More](#)

**Barry Schwartz** 2nd  
Vice President - Wealth Management at UBS Financial Services, Inc.  
Miami/Fort Lauderdale Area | Financial Services

Current UBS  
Previous Bernstein Global Wealth Management, Nationwide Financial  
Education University of Cincinnati

[Connect](#) [Send Barry InMail](#) 500+ connections

<https://www.linkedin.com/in/barry-schwartz-4768a42> [Contact Info](#)

**Background**

**Summary**

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# Get Your Profile Right

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4 mutual connections  
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**Business Owners:**  
Key Executive Retention  
Business Continuation  
Exit Planning

**Families and Individuals:**  
Comprehensive Financial Planning  
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- Kelly Usher - 3rd**  
Relationship builder and impactor; investing time in building people up, coaching, and advising to your future.
- James D. (Jake) Geleerd - 3rd**  
CEO Tortoise Family Office
- Jillian Stupak - 3rd**  
Business Operations Consultant at MML Investor Services, LLC
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Building and Protecting Wealth for High Net Worth Families and Small Businesses
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Founder at GRIT Resilience Interactive Technologies
- Deanna Patton - 3rd**  
Business Operations Manager  
Financial Advisors



**1/3** of Investors looked at Advisor's personal Facebook page

**50%** decided not to work with the Advisor as a result

But it gets worse...

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



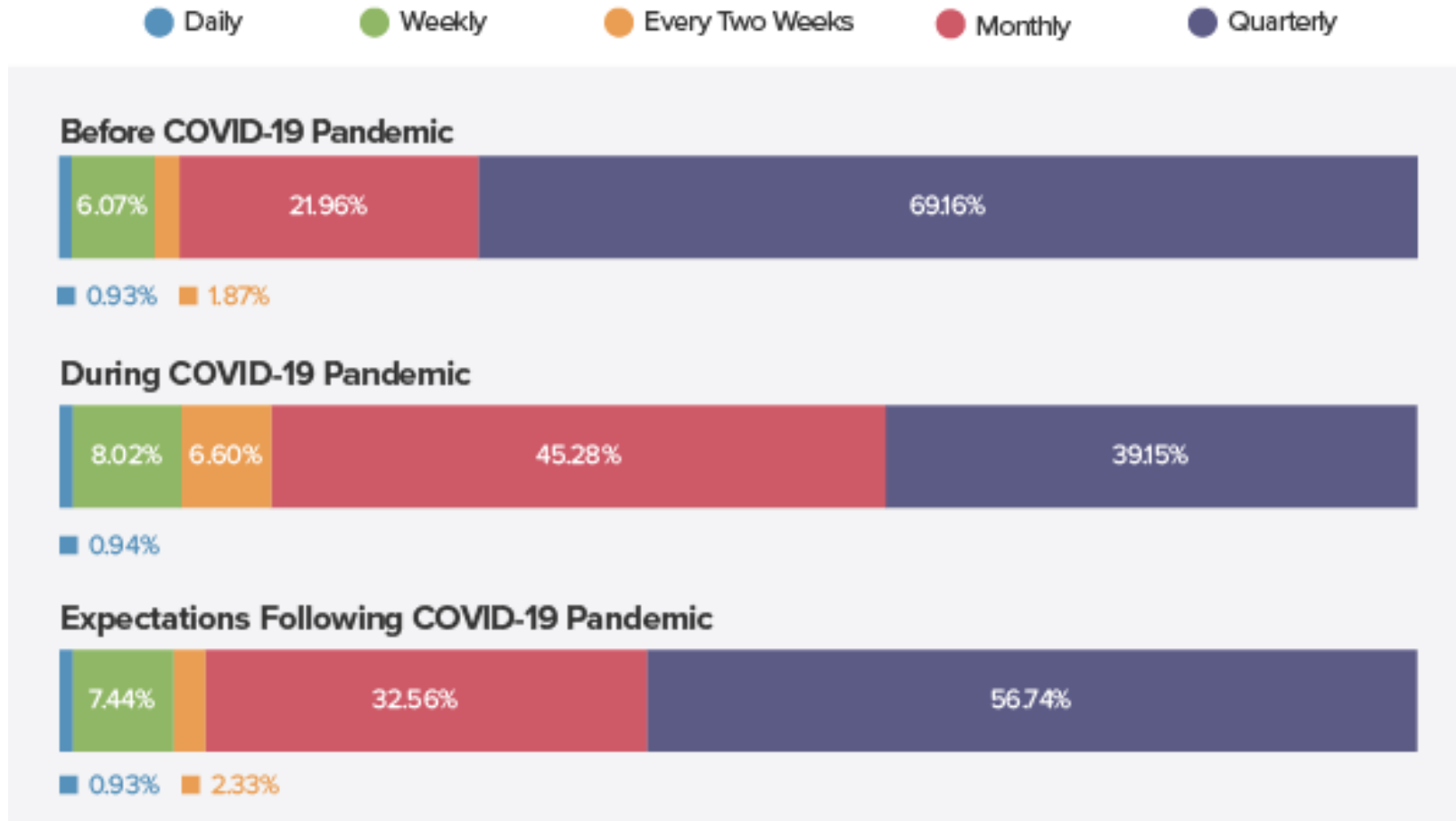
**2/3** of Investors under 40 looked at Advisor's personal Facebook page

**66%** decided not to work with the Advisor as a result

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

# Communication Frequency

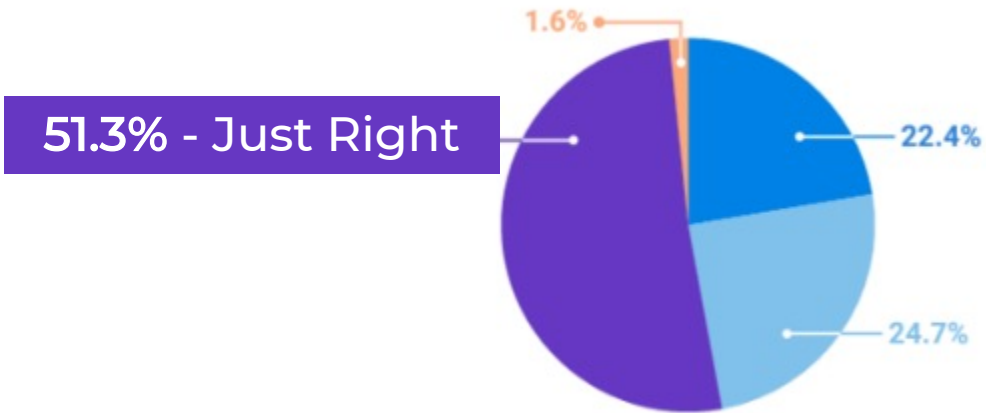
## Client Expectations



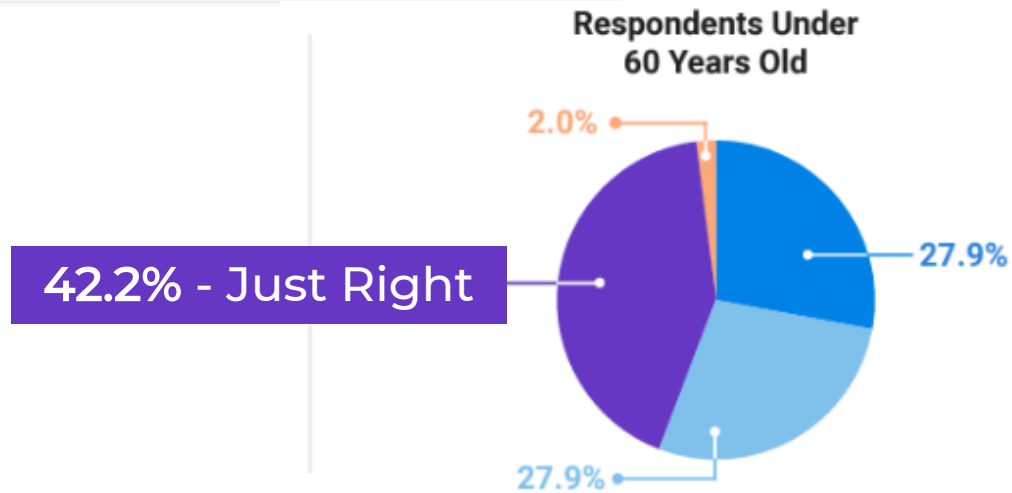
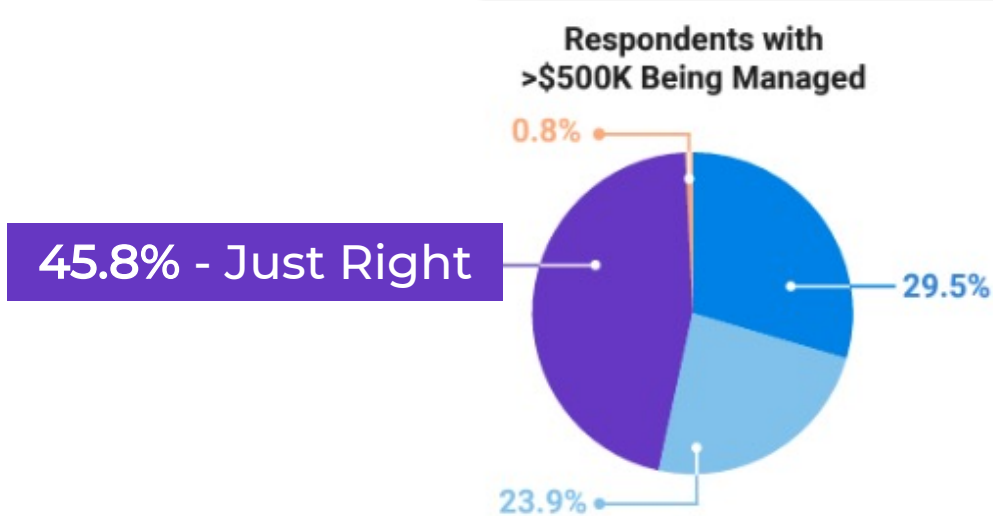
Source: SmartAsset Survey, March 2021

# Communication Frequency

## Client Reality



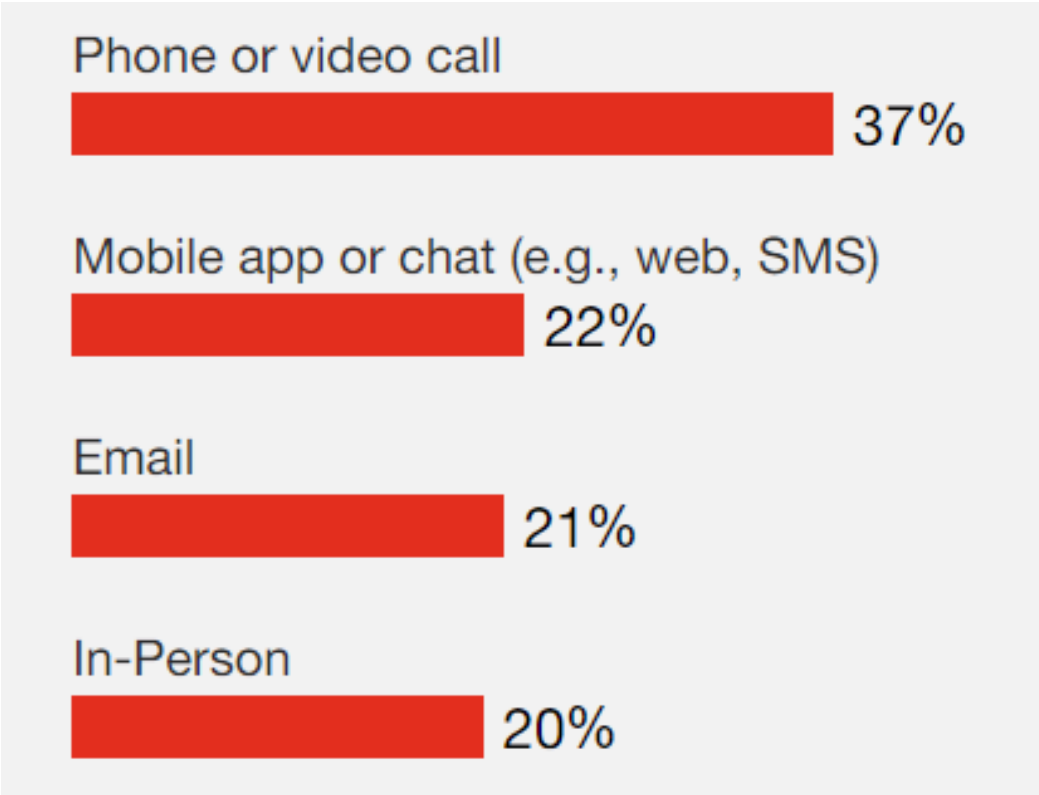
- I wish my advisor contacted me much more frequently
- I wish my advisor contacted me somewhat more frequently
- I am happy with the level of contact frequency from my advisor
- I wish my advisor would contact me less frequently



Source "How Can Advisors Better Communicate with Clients?" Y Charts 2022



# How the HNW Like to Communicate



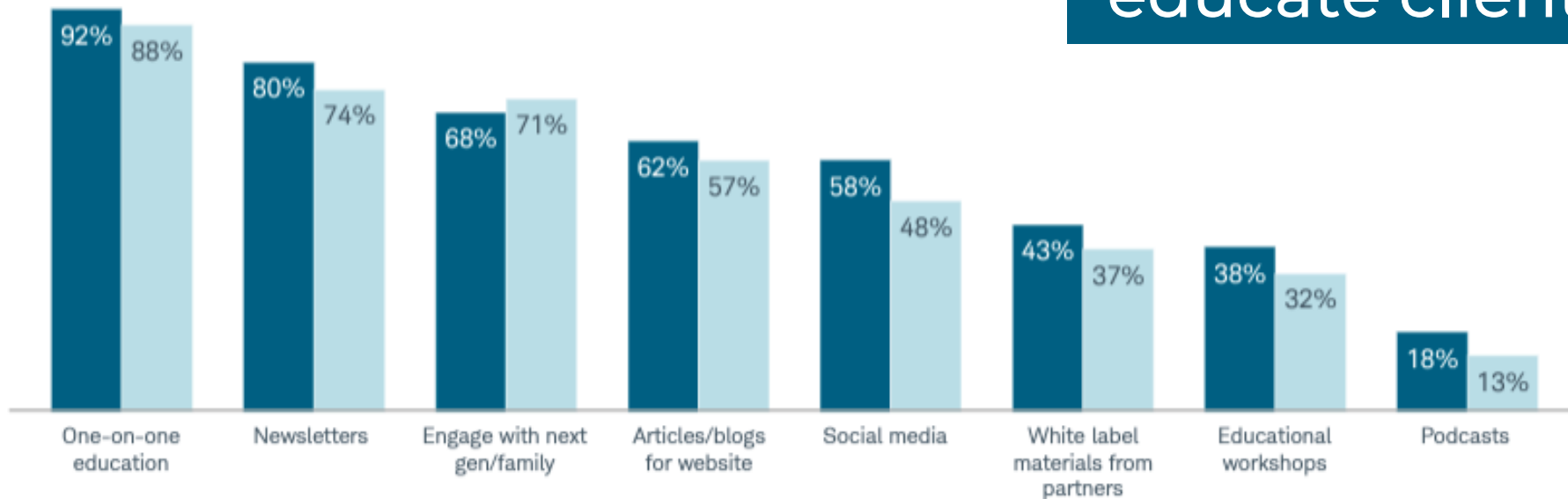
Source: PwC HNW Investor Survey 2022

# Ongoing Client Education

Also helps support new business efforts

## Firms using client education tactics

■ Top Performing Firms  
■ All other firms



Median firm  
uses 5 tactics to  
educate clients

Source: 2023 RIA Benchmarking Study from Charles Schwab

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# Communications Strategy

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12

touch points



4

conversations



1

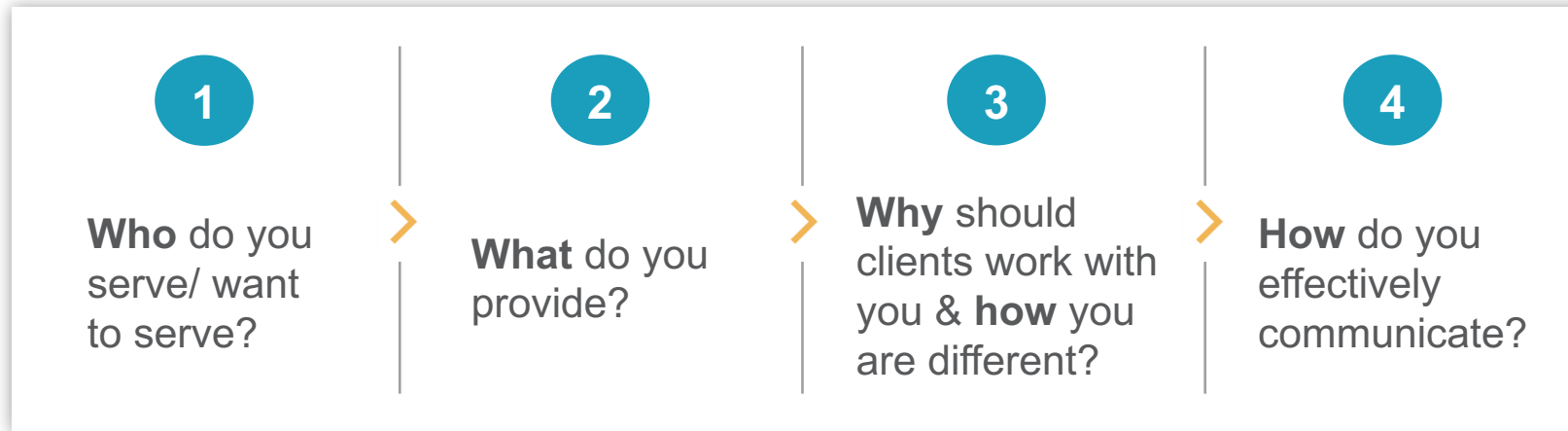
meeting



1

event  
invitation

# 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:

# ABC Wealth Growth Plan



## WHO do you serve/want to serve?

Mass affluent, education-focused families. Also, possible niches in Executives and converting college planning clients.

## WHAT do you provide?

College planning, comprehensive financial planning, excellent client services, and executive services

## WHY should clients work with you? How are you different?

We provide an excellent client experience with years of expertise and experience in planning.

### Goal 1

Convert 7 college planning clients

### Goal 2

Spend 50% of time with clients

### Goal 3

5 new college planning referrals & 5 new AUM referrals

### Goal 4

Onboard 50 new college planning clients



## Goal 3: 5 new college planning referrals & 5 new AUM referrals

### Strategy:

Educating clients on all services offered beyond just education planning.

Continue to nurture and grow strategic alliances

### Steps to Take

- Create a holistic messaging strategy, emphasizing that you provide “Comprehensive Financial Planning for Education-Focused Families”
- Ask 10 clients why they work with you – why they would refer you
- Create drip campaign to college planning clients reminding them of all services offered
- Update landing page and share with strategic alliances to use to refer potential clients

Target Completion Date: 6/1/2024

# Two Key Planning Tools

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## Planning the Future with Your Strategy Canvas

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Defining and Enhancing Your Competitive Advantages

Firm Name: \_\_\_\_\_

Date: \_\_\_\_\_

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SYMMETRY ADVISOR STRATEGIES

## Growth Plan

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Practice: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

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Thank You

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

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