



OneVoiceRIA

OneVoceRIA is a national campaign to show end clients that they have three options for investing their monies, not just two. Today for most end clients the two options are (1) Do It Yourself (DIY) and (2) broker-dealer. A Discovery Data study showed that only 16% of high net worth clients are aware that RIAs exist. Our objective is to raise the awareness of RIAs as an option for them from the 16% to 50% in 2 years or sooner. Once we reach this goal, we close shop.

We will not focus on differences between RIAs and B-Ds. There are other organizations (FPA, NAPFA) that can speak to the relative advantages of B-Ds vs. RIAs. Our campaign pledges that it will *not be anti-broker dealer*. We must believe that both B-Ds and RIAs are viable options and the end-client should be the one to decide their direction.

Our job is to show end clients WHAT the options are, not which is better.

We do not see ourselves as yet another organization. Ours is a finite time-span national campaign. Once we reach 50% awareness we are done and we will close shop.

We see three phases: one is to have RIAs express what they do with a common voice. A challenge is that RIAs are not homogenous. What we are hoping to do is to come up with a logo and a tag-line with the help of external a marketing firm that will be used by all RIA firms in their marketing avenues (web site, brochures other). The next phase we see is the dissemination of the movement through articles in trade journals (Investment News, FA, FP, FPA, other) and speaking engagements in professional conferences. The third phase is articles in the retail press (AARP, Readers Digest, Money Magazine other). The last phase will also include internet web advertising, blogs and viral marketing. We are engaging a marketing firm to design the logo / tagline and help us define the later steps.

Finance and support: We aim to get 60% to 80% of RIA firms to join in this movement over the next one year. Membership fee is purposefully low; \$25 per advisor (minimum \$50 maximum \$5,000 per firm). We hope for and will encourage viral marketing of our movement: please tell TWO other firms about our movement. 2 times 2 times 2 times ... can become an explosion. We just do not have the monies for large scale marketing and need your help.

We also seek support from major National associations FPA and NAPFA and from corporate organizations (all the major custodians and other corporations). The sponsorship fee from associations will be less than from corporations. The sponsorship fees from corporations will be tiered (platinum, gold and silver).

The ultimate goal: Present end clients with choices: Do it yourself, B-Ds and RIAs.

For more information please call any member of our steering committee.

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To become a member please go to our web site www.OneVoiceRIA.com