

SAMPLE STRATEGY ONE-PAGER

Objective: Add \$200K in revenues from new clients in 2017 and improve asset retention by 10%

Audience: Gen X clients, with a focus on couples, who have investable assets over \$750K, high earnings, and are dealing with a lot of financial trade offs.

Motivations: The target audience is being bombarded with advertising and isn't sure what to do. They are comparison shoppers, but they are willing to pay for great experiences or unique quality. They're skeptical about financial services and they are time starved. Their friends have advisors but no one is particularly thrilled. They are weighing their options but nothing has really inspired them to get their financial life together. Truthfully, money is a scary topic and thinking about it makes them uncomfortable

Target market: Two career families where one or both are corporate execs. Open minded types who like the idea of co-creation versus delegation.

Offering: You get the best combination of true expertise and human insight with tools to help you feel great about managing life and money

Key benefits:

1. An **enjoyable discovery process** that will help you identify your hopes and your worries, and ensures that your advisor really knows you.
2. A **financial wellness plan** and checklist so you can make more mindful decisions and we can take some of the work off your plate.
3. A team of **real, tested experts** to design and manage the right investment strategy, **beyond the cookie cutter models**.
4. Digital tools, convenient access, and great report packages to **help organize your life (so you can relax a bit)**.
5. An **annual cost benefit analysis** to measure how we've saved you stress, time and money while helping to grow your wealth and life satisfaction.

Marketing guidelines: Tone is simple, clear and human. Honest, authentic and unafraid to have opinions. Built on a belief that hybrid robos are "less than" and risky, and other advisory firms have failed to modernize.

Why choose you? People who come to us aren't willing to sacrifice expertise or human connection to get convenience and cost effectiveness. They get real coaching about life and money, not just a voice on the phone or a simple algorithm that could be all wrong for them.

