

THE ESSENTIAL ELEMENTS OF **The Marketing Approach**



— Est. 2006 —

Name:

Date:

About ClientWise LLC



ClientWise is the premier business and executive coaching firm working exclusively with financial professionals.

We specialize in helping clients optimize growth and maximize revenue by engaging as a knowledgeable partner in accomplishing specific and significant business results.

Our full-service coaching program empowers financial advisors, wholesalers, managers and executives to enhance performance through customized, action-oriented solutions based on each client's specific vision and situation.

Our certified coaches are members of the International Coaching Federation (ICF). They adhere to ICF's strict code of ethics and have the experience and insight to work with you on the unique challenges and opportunities you face each day.

Drawing from an in-depth knowledge of the financial industry, ClientWise's mission is to professionally develop industry leaders and consistently raise the bar for industry service, commitment and integrity. Simply put, our singular focus is to help you **get clear, get focused, and get results.**

INTRODUCTION

Your Marketing Approach Is Central to Your Success

ClientWise is the premier business and executive coaching firm working exclusively with financial professionals. We specialize in helping clients optimize growth and maximize revenue by engaging as a knowledgeable partner in accomplishing specific and significant business results.

Within the ClientWise Professional Advisory Model,[™] the Marketing Approach is the centerpiece of a successful financial advisory practice. When formulated and executed effectively, the Marketing Approach underpins how you perceive your practice and how you communicate that value proposition to others: to prospective clients, current clients, the media, your community, your employees, and other stakeholders.

A comprehensive marketing strategy involves branding your practice, positioning yourself appropriately in the marketplace, and ultimately defining, attracting, onboarding, and retaining Ideal Clients. As with every other aspect of the ClientWise Professional Advisory Model,[™] the Marketing Approach must be broken down into a defined process. Without deliberate consideration and a process-driven strategy, your efforts are likely to be scattershot and not particularly effective.

How to Use This Guidebook

Step 1: Assess

Work through each of the following five sections sequentially. Read the definitions — they are the foundation of the assessment. Rate yourself honestly on the 1–10 scale based on where you actually are today, not where you intend to be.

Step 2: Discuss

Answer the coaching questions at the end with your leadership team or your ClientWise coach.

Step 3: Act

Finish with a committed 90-day action plan.

SECTION 1 Marketing Strategy & Brand

A winning Marketing Approach begins with deliberate strategy and a compelling brand. Without a written plan, a dedicated budget, and a clear brand identity, even the best advisory practice tends to market reactively, inconsistently, expensively, and with limited results. Strategy and brand are the foundation on which everything else is built. **Key terms used in the assessment that follow are defined below.**

1

Marketing Plan and Strategy

A document in which an advisor boils down the most important information about the advisory business and identifies key marketing objectives. These goals are further refined into the activities and tactics that comprise an action plan. Without a written plan, marketing becomes reactive and scattershot — the enemy of consistent client acquisition.

2

Marketing Calendar

A document that integrates everything related to marketing: goals and objectives, campaigns, strategic initiatives, and tactics within a calendar that lays out implementation on a day-by-day, week-by-week approach. The calendar turns strategy into scheduled, accountable action.

3

Annual Marketing Budget

The tangible manifestation of an advisor's commitment to marketing, as evidenced by a conscious allocation of dollars and resources to marketing activities. A budget forces intentionality and enables measurement of marketing return on investment.

4

Brand Identity

A financial advisory practice's personality — which defines how it relates to clients, team members, colleagues, Loyal Client Advocates™, and others. Brand Identity hones in on exactly how a practice differentiates itself from the competition. It is expressed consistently across every touchpoint: how your phone is answered, how proposals are written, how your team describes what you do. Brand is a culture-creator; it shapes internal behavior as much as external perception.

5

Value Proposition (Value Promise)

A clear statement of the way a financial advisory practice proposes to deliver superior value by harnessing its resources in a profitable way. The Value Proposition answers the client's most important question: 'Why should I work with you?' It must be concise, distinctive, and deliverable, and every team member must be able to articulate it confidently.

SECTION 1 ASSESSMENT

Marketing Strategy & Brand

Instructions: Rate each statement 1–10 based on where your practice is today.

1 – 3 = **Emerging** (informal, inconsistent, reactive)

4 – 6 = **Developing** (partially in place, not yet institutionalized)

7 – 10 = **High Performing** (consistent, measurable, scalable, documented)

Marketing Strategy & Brand		Rate 1-10
1	We have a written Marketing Plan and Strategy that identifies our key marketing objectives and the specific activities and tactics that support them.	
2	We maintain an active Marketing Calendar that integrates our goals, campaigns, and tactics on a day-by-day, week-by-week basis, and we refer to it consistently.	
3	We have an Annual Marketing Budget that reflects a deliberate allocation of dollars and time to marketing activities, and we measure its return on investment.	
4	We have a defined Brand Identity — values, voice, visual standards, and key messages — that is applied consistently across all client, prospect, and team touchpoints. Our team can articulate who we are and how we are different.	
5	We have a clear, compelling Value Proposition (Value Promise) that every team member can state confidently and that is reflected in all of our marketing materials.	
Section 1 Score:		/50

SECTION 2 Marketing Communications & Campaigns

Strategy without execution is aspiration. Section 3 examines whether your marketing communications — the materials, messages, and campaigns that carry your brand into the marketplace — are working as hard as your advisors are. A compelling presentation deck, a disciplined communications plan, and well-executed campaign priorities are the bridge between strategy and client acquisition. **Key terms used in the assessment that follow are defined below.**

11

Marketing Collateral

The collection of media used by an advisor and their team to support the sales of a product or service. Examples include sales aids used in presentations, web content, brochures, white papers, case studies, sales scripts, and other information. Effective collateral is not generic; it reflects the practice's brand identity and speaks directly to the needs and concerns of the Ideal Client Type.

12

Presentation Deck

Assembles key information and educational material in a compelling, easy-to-understand package. Formerly known as the pitch book, a Presentation Deck clarifies your message, strengthens your credibility, and sharpens your sales approach. The best presentation decks lead with the client's world — their goals, concerns, and the problems you solve — rather than with the advisor's biography or product lineup.

13

Marketing Communications Plan

The concrete communications methodology used to explain and clarify your value proposition. A Marketing Communications Plan defines who you are communicating with, what you are saying to them, through which media you are reaching them, and how often. It is designed to effectively communicate specific objectives across phone, mail, in-person, third-party, and electronic channels.

14

Campaign Priorities

The action steps that a financial advisory practice plans to take to achieve the objectives of the overall marketing plan. These are the big ideas; they set the direction. Marketing campaigns are the action that carries out the plan. Campaign Priorities ensure that marketing effort is concentrated on the activities most likely to generate qualified prospects and referral introductions.

15

Special Events

A planned program of regular get-togethers with clients and prospective clients outside of normal business channels. The goal is to frequently meet a variety of clients in small groups in a range of interesting venues in order to deepen personal relationships and build credibility and trust. Research consistently ranks in-person events as the most effective business development activity across all firm sizes.

SECTION 2 ASSESSMENT

Marketing Communications & Campaigns

Instructions: Rate each statement 1–10 based on where your practice is today.

1 – 3 = **Emerging** (informal, inconsistent, reactive)

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Marketing Communications & Campaigns		Rate 1-10
11	We have professional Marketing Collateral — presentations, white papers, case studies, web content — that is current, on-brand, and aligned with the needs of our Ideal Client Types.	
12	We have an updated Presentation Deck that leads with the client’s world, clearly communicates our value proposition, and consistently closes well-qualified prospects.	
13	We have a written Marketing Communications Plan that defines what we say, to whom, through which media, and how often — and we execute it consistently.	
14	We have defined Campaign Priorities for the current quarter — specific, big-idea marketing actions that are moving our marketing plan forward and generating prospect introductions.	
15	We host regular Special Events — client appreciation events, educational roundtables, niche-specific gatherings — that deepen relationships, generate referrals, and create credibility in our target market.	
Section 3 Score:		/50

SECTION 3 Client Segmentation & Market Focus

The most successful financial advisory practices do not try to serve everyone. They are laser-focused on the specific clients they are best positioned to serve, and they build every aspect of their practice around that clarity. Segmentation is not a marketing tactic. It is a strategic choice that shapes hiring, pricing, service design, and business development. **Key terms used in the assessment that follow are defined below.**

6

Ideal Client Types

The most successful financial advisory practices are laser-focused on whom they serve best. At ClientWise, we refer to this well-defined group of clients and potential clients as Ideal Client Types. An Ideal Client Type is defined by wealth tier, complexity of need, life stage, values, and behavioral profile. It guides every business development conversation and ensures the firm's energy is directed toward relationships with the highest mutual value.

7

Client Segments

The process of segmenting current and prospective clients into sub-categories or groups. Clients have differing needs, and not all clients share the same underlying preferences for the services and products an advisor offers. Active segmentation drives how an advisor allocates time, tailors service levels, and prioritizes relationships, which directly impacts both profitability and client satisfaction.

8

Niche Specialization

The deliberate decision to develop deep expertise in serving a specific sub-group of clients, such as business owners, women in transition, corporate executives, or multi-generational families. Niche specialization sharpens a firm's value proposition, concentrates referral activity, and creates a defensible competitive position that generalist practices cannot easily replicate

9

Market Positioning

How an advisory practice is perceived relative to competitors in the minds of its target clients, centers of influence, and community. Strong market positioning is the outcome of clear ICP definition, consistent brand expression, and deliberate communication of a distinct value proposition. Advisors who are well-positioned generate better-fit referrals and command stronger pricing.

10

Wealth Management Services and Products

The offerings provided by a wealth management firm to meet the needs and concerns of its Ideal Client Types, and the conscious choice to provide those services over other potential services and products. Service and product choices are a marketing statement. Firms that bundle financial planning, tax coordination, estate guidance, and investment management at a stated fee attract and retain more loyal, higher-value clients.

SECTION 3 ASSESSMENT

Client Segmentation & Market Focus

Instructions: Rate each statement 1–10 based on where your practice is today.

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Client Segmentation & Market Focus		Rate 1-10
6	We have a clearly defined Ideal Client Type that is documented, shared with our entire team, and used to evaluate every new prospect opportunity.	
7	We actively segment our current client base by need, complexity, and revenue potential, and we allocate service time and resources accordingly.	
8	We have a deliberate niche or specialization that we can articulate clearly and that is reflected in our marketing, our messaging, and the types of referrals we receive.	
9	Our market positioning is clear and differentiated — our target clients, centers of influence, and community understand who we serve best and why we are the right choice for them.	
10	Our wealth management service and product choices are deliberately aligned with the needs of our Ideal Client Types, and we have made conscious decisions about what we offer and what we do not.	
	Section 2 Score:	/50

SECTION 4 **Client Advocacy & Professional Networks**

Referrals account for 65–77% of all new clients acquired by advisory firms. Yet most firms treat referrals as a by-product of good service rather than the output of a deliberate, managed system. Section 4 examines whether your practice has built the structures, relationships, and disciplines that convert satisfied clients and professional advocates into a predictable, high-quality referral engine.

Key terms used in the assessment that follow are defined below.

16

Loyal Client Advocates™

Clients who appreciate and understand what a financial advisor does to the degree that they become natural advocates for the practice. Loyal Client Advocates™ respect and value their relationship with the advisor, can clearly articulate what the advisor does, and actively provide referrals and introductions. They are not simply satisfied clients — they are clients who have experienced the practice’s value so meaningfully they feel compelled to share it.

17

Professional Advocate Network™

The network of trusted advisors who help deliver an overarching wealth management model. This includes defining and building a network of strategic partners, developing your approach to working with clients’ other trusted advisors, leveraging referral and introduction opportunities, and constructing a strategy that maintains and nurtures these relationships. CPAs, estate attorneys, business advisors, and other centers of influence represent the highest-quality source of new client AUM available to advisory firms.

18

Referral Tracking and Conversion

The systematic measurement of referral activity, from initial mention through introduction, meeting, and new client conversion. High-performing firms track advocate mentions, referral introductions made, conversion rate, referral close rate, and revenue per referred client. Without tracking, referral activity remains invisible, unmanaged, and consistently underperforms its potential.

19

Advocate Activation

The deliberate process of educating and equipping Loyal Client Advocates™ to make high-quality referral introductions on the practice’s behalf. The most effective activation tool is the Dedicated Introduction Meeting (DIM) — a structured, optional conversation with top advocates that educates them on the firm’s Ideal Client Type, equips them with language to describe the firm’s value, and empowers them to make warm, confident introductions. Activation is the difference between clients who could refer and clients who do.

20

Center of Influence (COI) Development

The intentional process of identifying, cultivating, and formalizing professional relationships with CPAs, attorneys, business advisors, and other professionals who serve the same clients an advisory firm targets. Effective COI development is built on a reciprocity-first approach: the advisors who generate the most COI referrals are those who refer to their COI partners first — consistently, thoughtfully, and with the COI’s ideal client clearly in mind.

SECTION 4 ASSESSMENT

Client Advocacy & Professional Networks

Instructions: Rate each statement 1–10 based on where your practice is today.

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7 – 10 = **High Performing** (consistent, measurable, scalable, documented)

Client Advocacy & Professional Networks		Rate 1-10
16	We have a systematic program to identify, cultivate, and activate Loyal Client Advocates™ — clients who refer proactively, can articulate what we do, and actively make introductions on our behalf.	
17	We have a structured Professional Advocate Network™ — a defined set of COI relationships with explicit engagement cadences, reciprocal referral commitments, and formalized partnership agreements.	
18	We track referral activity systematically — advocate mentions, introductions made, referral conversion rate, and referral close rate — and we use that data to improve our advocacy program.	
19	We have a deliberate Advocate Activation process — including structured conversations that educate advocates on our Ideal Client Type and equip them with the language and confidence to make warm introductions.	
20	We actively develop Center of Influence relationships using a reciprocity-first approach — referring to our COI partners before asking for referrals, and regularly deepening the relationships that generate the highest-quality introductions.	
Section 4 Score:		/50

SECTION 5 **Digital Marketing & Visibility**

Digital presence is no longer optional for advisory firms — it is the first impression most prospects and centers of influence encounter before they ever speak with you. Section 5 examines whether your CRM, social media, website, public relations, and advertising are working together as an integrated system — or operating as disconnected, underinvested afterthoughts. **Key terms used in the assessment that follow are defined below.**

21

Client Relationship Management (CRM) / Database

A strategy for managing an advisor's interactions with clients, customers, and sales prospects. A CRM system uses technology to organize, automate, and synchronize business processes — principally sales activities, but also for marketing, client services, and technical support. A well-implemented CRM is the operational backbone of a firm's growth system: it tracks pipeline activity, referral sources, client segments, communication history, and marketing campaign performance.

22

Social Media

A type of online marketing that uses networking, advertising, and public relations to carry out marketing objectives on platforms such as LinkedIn, YouTube, X (formerly Twitter), and blogs. For advisory firms, LinkedIn and YouTube represent the highest-ROI social platforms — LinkedIn for professional networking and COI visibility, YouTube for thought leadership content that compounds in value over time. Social media without a deliberate strategy and consistent execution is expensive noise.

23

Website

The most effective advisor website demonstrates clarity of message, flow of content, and an overall professional look. Based on a first impression of your website, both current and prospective clients form an overall opinion of your practice and its core characteristics — including communication skills, technical savvy, ability to stay current, and attentiveness to detail. Your website is your 24-hour business development representative. It must be built around your Ideal Client Type, not your firm's internal structure.

24

Public Relations Strategy

A document in which an advisor identifies the most important visibility goals for the advisory business and the activities and tactics that coalesce into a plan of action. Public relations — including media coverage, community leadership, industry recognition, and thought leadership publication — builds the credibility and name recognition that makes every other marketing activity more effective.

25

Advertising Approach

The creative marketing message that is (1) consistent with an advisor's marketing and communications strategy, (2) appropriate for the target audience, (3) clear and consistent, and (4) integrated with all other touchpoints between the brand identity and target audience. Advertising for advisory firms — whether digital, print, or event sponsorship — should reinforce brand identity and ICP positioning, not simply promote products or services.

SECTION 5 ASSESSMENT

Digital Marketing & Visibility

Instructions: Rate each statement 1–10 based on where your practice is today.

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Digital Marketing & Visibility		Rate 1-10
21	Our CRM/Database is actively maintained and used to manage client and prospect interactions, track referral sources, monitor pipeline activity, and support marketing campaign execution.	
22	We have a deliberate Social Media strategy — a consistent, on-brand presence on the platforms (especially LinkedIn and YouTube) where our Ideal Clients and COI partners spend time — and we execute it consistently.	
23	Our Website reflects our brand identity, leads with the client’s world rather than the firm’s internal structure, and creates a strong, credibility-building first impression for ideal prospects and COIs.	
24	We have a Public Relations Strategy that defines how we build visibility and credibility through media coverage, community leadership, industry recognition, and thought leadership publication.	
25	Our Advertising Approach is consistent with our brand identity, targeted to our Ideal Client Type, and integrated with our marketing communications plan rather than operating as a standalone, disconnected activity.	
Section 5 Score:		/50

Notes:

Assessment Score Summary

Transfer your section scores below. Your combined total reflects your current Marketing Approach readiness and identifies your highest-leverage areas for investment.

Section		Your Score	Max
1	Marketing Strategy & Brand		50
2	Client Segmentation & Market Focus		50
3	Marketing Communications & Campaigns		50
4	Client Advocacy & Professional Networks		50
5	Digital Marketing & Visibility		50
Score Total Marketing			

Interpreting Your Score

200–250	Marketing Leader	You have invested significant discipline in your Marketing Approach. Seek ways to refine, differentiate, and elevate what you are already doing well.
150–199	Developing Momentum	You have real strengths to build on. Focus on the categories that most directly drive client acquisition and referral activity. Be specific.
100–149	Needs Intentional Work	Several areas deserve immediate attention. Identify the two or three highest-leverage gaps and address them first.
50–99	Time to Take Action	You are likely aware of the gaps. The cost of inaction is compounding. Prioritize and start building the foundation now.
Below 50	Start Here	This is the right moment to develop a plan and commit to your most immediate areas for improvement. Your ClientWise coach will help you sequence the work.

Notes:

SECTION 1
**Marketing
Strategy & Brand**

Coaching Questions

The following coaching questions are organized by section. Work through them with your leadership team or your ClientWise coach after completing the assessment. Use your lowest-scoring sections to prioritize where to begin.

1. Vision of Your Brand

If a high-net-worth prospect encountered your practice for the first time — your website, your social presence, your capability deck — would what they found increase or decrease the likelihood that they would agree to meet with you? What would you change?

2. Strategy vs. Activity

Do you have a written marketing plan, or do you have a list of things you are trying to remember to do? What is the difference between those two — and what is the cost of that gap in your practice today?

Notes:

3. Brand as Culture

When your team members describe your practice to a prospect or colleague, are the answers consistent, compelling, and on-brand? What would it take to make them so — and how would that change your client acquisition results?

4. Budget Reflects Belief

Does your marketing budget reflect what you say marketing is worth to your practice? What would you invest in marketing if you knew exactly what the return would be?

5. Three-to-Five-Year Identity

Three to five years from today, what will your practice be most known for delivering to clients? How does your current brand position support, or undermine, that aspiration?

6. Materials That Work

When you hand a prospect your Presentation Deck or marketing collateral, does it do the work of a great first conversation — or does it require you to explain and apologize for it? What would world-class look like?

7. Communications Discipline

How consistently do you communicate with your clients and prospects? If you mapped out every touchpoint over the last 90 days, would it reflect a deliberate strategy — or a pattern of activity driven by urgency rather than intention?

8. Campaign Focus

Of all the marketing activities competing for your time and budget, which two or three would generate the most qualified introductions in the next 90 days if you invested in them fully? What is stopping you?

Notes:

9. Events as Growth Strategy

How are you using in-person events to deepen existing relationships and generate new introductions? What would a structured, quarterly event program mean for your client acquisition results?

10. Message Clarity

Can every person on your team articulate your value proposition in one sentence, the same sentence, in a way that would resonate with your Ideal Client Type? What is the gap between where you are and where you need to be?

SECTION 3
**Client Segmentation
& Market Focus**

11. Clarity of Focus

If you asked each member of your team to describe your Ideal Client Type in one sentence, would the answers be consistent? What does the level of consistency, or inconsistency, tell you about how embedded that clarity actually is in your practice?

12. The Cost of Generalism

What business are you trying to be all things to all people in today — and what is it costing you in referral quality, service complexity, and advisor time? What would a more focused practice make possible?

13. Segmentation as Strategy

How do you currently allocate your time and energy across your client base? If you segmented your clients by value and need tomorrow, who would get more of your attention — and who would you transition out?

Notes:

14. Niche as Competitive Moat

What niche or specialization could you own in your market — one where your experience, network, and passion create a genuine competitive advantage that a generalist practice could not replicate?

15. Services as a Signal

What does your current service menu say about the clients you want to attract? If you could redesign your wealth management offer from scratch around your ideal client's deepest needs, what would change?

SECTION 4
**Client Advocacy
& Professional
Networks**

16. The Advocacy Opportunity

What percentage of your referral mentions actually convert into introductions — and then into new clients? What is the gap between what is possible and what you are achieving, and what is the dollar value of that gap annually?

17. Who Are Your Advocates?

Which of your current clients would describe your practice with genuine enthusiasm to a peer — right now, unprompted? What creates that level of advocacy, and how could you engineer it more deliberately across a larger portion of your client base?

Notes:

18. Building the Network

How many COI relationships in your Professional Advocate Network™ are truly productive — generating regular, high-quality introductions? What would it mean for your practice if that number doubled in the next 12 months?

19. Reciprocity as Strategy

How consistently do you refer to your COI partners before asking for referrals? What would a more deliberate, documented reciprocity system look like — and how would it change the quality of the introductions you receive?

20. Activation vs. Hope

Are you relying on clients to refer on their own, or do you have a structured process that educates, equips, and activates them? What is the difference between those two approaches in the results they produce?

SECTION 5
**Digital Marketing
& Visibility**

21. Your Digital First Impression

If a high-net-worth prospect searched for you online tomorrow — your website, LinkedIn profile, and any media mentions — would what they found increase or decrease the likelihood of an initial meeting? What would you change?

22. CRM as a Growth Tool

Is your CRM a contact list, or is it a growth system? What would it mean for your pipeline, your referral tracking, and your campaign execution if your CRM were fully activated and used consistently by every person on your team?

23. Content as Compound Interest

What thought leadership content are you creating that will still be generating prospect conversations 12 months from now? What is your plan to build a content library that works for your practice while you are serving clients?

Notes:

24. Visibility Beyond Your Network

How well-known are you outside of your existing client and COI network? What PR or community visibility strategy would put you in front of the prospects and partners who don't yet know you exist?

25. Integration vs. Isolation

Are your digital marketing activities — CRM, social media, website, PR, and advertising — working together as a coordinated system, or operating independently with no one accountable for the whole? What would an integrated digital strategy make possible?

Marketing Readiness Next-Steps

Before building your 90-day action plan, work through these five questions. They're designed to prompt a focused, honest leadership conversation, whether with yourself or your ClientWise coach. Your coach is prepared to help you prioritize the projects and focus areas most relevant to your Marketing Approach.

1 Your Greatest Strengths

Using the results from your section scores, what are your two or three genuine marketing strengths today — areas where you have real systems, consistent execution, and documented results?

2 Highest-Leverage Gaps

Which sections scored lowest? Which of those gaps, if left unaddressed for another 12 months, would most limit your growth, your referral quality, or your ability to attract and retain Ideal Clients?

3**Unconstrained Vision**

If time and money were no obstacle whatsoever, how would you change or improve your own Marketing Approach today? What would a world-class marketing system look like for your practice?

4**Your Greatest Strengths**

Three to five years from today, what will your practice be most known for delivering to clients? How does your current Marketing Approach support, or undermine, that future identity?

5**Honest Self-Assessment**

Of the items listed in the checklist, which are you most comfortable with? Which are you least educated about? Which are you unlikely to tackle without outside accountability — and why?

Marketing Approach Focus: Next 90 Days™

Outline possible marketing projects below. Be honest about what is working, what needs to change, and what you are committed to prioritizing.

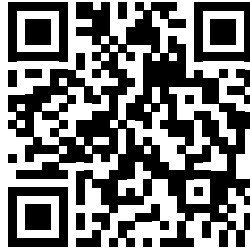
Possible Marketing Projects	What's Working Well	Areas for Change or Improvement
<p>EXAMPLE: Launch a quarterly client appreciation event targeting our top 20 ideal clients and their referred guests.</p>	<p>EXAMPLE: We host an annual holiday dinner that clients consistently enjoy and mention positively.</p>	<p>EXAMPLE: Events are ad hoc and not tied to a referral strategy; no follow-up process exists post-event to capture introductions or track outcomes.</p>

Quarterly Focus: My Top 5 Marketing Projects™

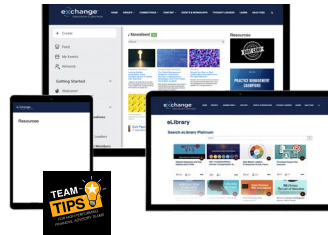
From your 90-day list, identify your top five priorities. Define the expected outcome, the payoff, the resources required, and who else needs to be involved.

	My Top 5 Marketing Projects	Expected Outcome
1		
2		
3		
4		
5		

The Payoff	Budget Required (time, money, etc.)	Others Involved



ACCESS CLIENTWISE RESOURCES
Podcast, Blog, Content, Team Tips
and Community eXchange™



Notes:

Notes:

A large grid of dotted lines for taking notes, covering most of the page.

Notes:

About ClientWise

ClientWise is the premier business and executive coaching firm working exclusively with financial professionals. Through the growth of individuals at all production levels, our mission is to develop leaders who raise the industry standards of professionalism, service, commitment and integrity. Financial professionals become resourceful problem solvers, more adept practice managers, and better business owners through the ClientWise coaching process. In turn, they bring these sustainable skills to benefit their clients, their businesses, their institutions, and ultimately the industry overall.

As members of the International Coaching Federation (ICF), our coaches adhere to a strict code of ethics and are provided with unique experiences that allow them access to the challenges and opportunities faced by financial professionals on a daily basis. Each coaching program is distinctively tailored to match the professionals' objectives, through services ranging from individual and team coaching, workshop facilitation, team facilitation, and coaching skills training.

This coaching process is coupled with our original ClientWise practice management content, which is developed from in-depth research by industry experts in both coaching and financial services. These proprietary tools and databases, including The ClientWise Benchmark Assessment Report™ and The ClientWise Coach Insights Database™, contain best practices from leading professionals and access to the most significant financial trends and influences worldwide.

Our ability to provide sound industry knowledge through the powerful lens of a coaching partnership is unmatched, and this combination solidifies the ClientWise advantage.

Our Philosophy

The Coaching Partnership

The coaching relationship, unlike that of consulting or advising, is a partnership formed between the financial professional and the coach. The relationship between the two evolves as the professional's business evolves, and as the financial services industry in which it resides evolves. Throughout this partnership, financial professionals work through their initial goals so that they can later attain successively larger goals independently, having achieved the intellectual and emotional mechanisms to self-coach and self-guide through their coaching program.

While each coaching program is defined by a specific timeframe, the relationship between coach and professional, and the tools and to take advantage of the lasting relationship with their coaches by continuing to model the journey learning initiated by their partnership.

As our overarching mission is to generate consistent industry improvement through the growth of individual professionals, we continually tap into our resources to generate the best practice management tools and content with which to fuel that improvement. When the financial services industry shifts and changes the environment, we have clarity around how to evolve with it. Our proprietary content and coaching tune up programs allow financial professionals the ability to evolve alongside ClientWise throughout the life of their businesses, providing even more opportunities for success moving forward.

The Axis of Coaching & Content

Content alone, delivered en masse, will not help financial professionals achieve the level of success they desire. Nor will content alone increase the productivity of a given firm or the financial services industry on the whole. Proof of this lies in a marketplace laden with content that is accessible to all financial professionals, the majority of whom continually fall short of their goals. Instead, it is the unique axis at which great content meets a powerful coaching partnership that success is achieved. And it is from here that our founder, Ray Sclafani, launched ClientWise. Ray's understanding of advisor behavior, especially as related to the acquisition programs he created at Alliance Bernstein, motivated him to launch ClientWise in 2006, and develop the distinctive relationship between coaching and content that is now a ClientWise signature.

Our clients' success stories continue to prove that strong content supported by our scalable ClientWise coaching programs achieves far better and more sustainable business results than content alone.

Get Started

Learn more about The ClientWise Coaching Partnership and begin to create sustainable business results.

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