

HOW TO BE EXTRAORDINARY

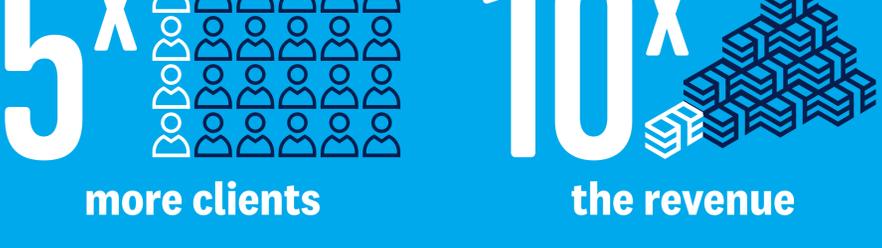
At Client Acquisition

Among our financial advisors ranked according to their annual revenue from new clients, 500+ high performers led the field with significant gains. See what they achieved—and how they made it happen.

● High performers ● Typical advisors



High performers added



Six key habits drove these extraordinary results



Time Management
Spend most of your time on clients and prospects



Business Development
Invest in diverse growth tactics



Technology
Leverage your CRM, and get 60% of clients in Account View



Team Size
Teams of 4+ advisors have wider networks, more expertise



Financial Planning
Expand into cashflow planning, and leverage a CFP®



Multi-Gen
Meaningfully engage your clients' families

Let's dive deeper into two of these key areas:

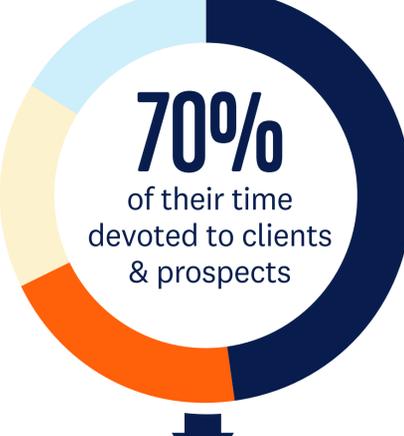
TIME MANAGEMENT

Focus on High-Value Tasks

● Client engagement ● Business development
● Investment management ● Admin and operations

High performer hrs. (weekly)

Typical advisor hrs. (weekly)



6 more hours spent on client and prospect engagement, servicing leads to more referrals

2.5 fewer hours allocated to business development

Delegated lower value tasks:

- Meeting prep
- Investment management
- Admin activities

5.5 hours misspent on administrative and investment tasks that can be automated or delegated

BUSINESS DEVELOPMENT

Diversify and Spend

High performers go beyond client referrals to attract new clients. Compared to typical advisors, they use a broader range of marketing tactics and spend more on business development.

Average number of marketing tactics advisors use



Top marketing tactics:

- Client appreciation
- Professional alliances
- Social media

Least used:

- Books/magazines
- TV/radio
- Direct mail

5.5X

Money high performers spend on business development, compared to typical advisors

\$66K

Annual investment in business development vs. \$12K for typical advisors

\$2,100

Spent on each new client vs. \$1,400 for typical advisors

By spending time and money strategically, the typical advisor can become a high performer and build an extraordinary business.

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Data according to an LPL Financial study conducted in 2021.

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