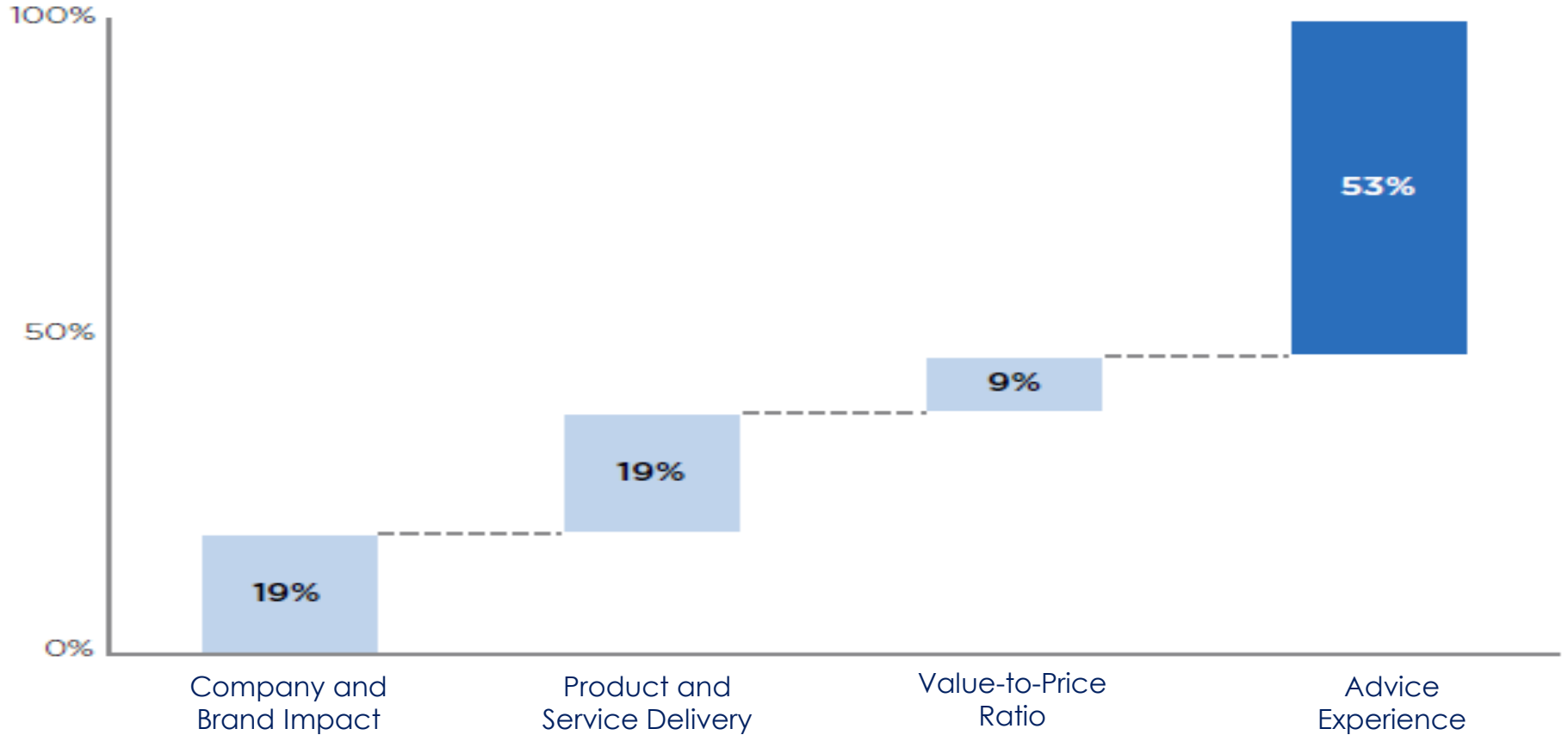




# Enhancing The Value of Advice

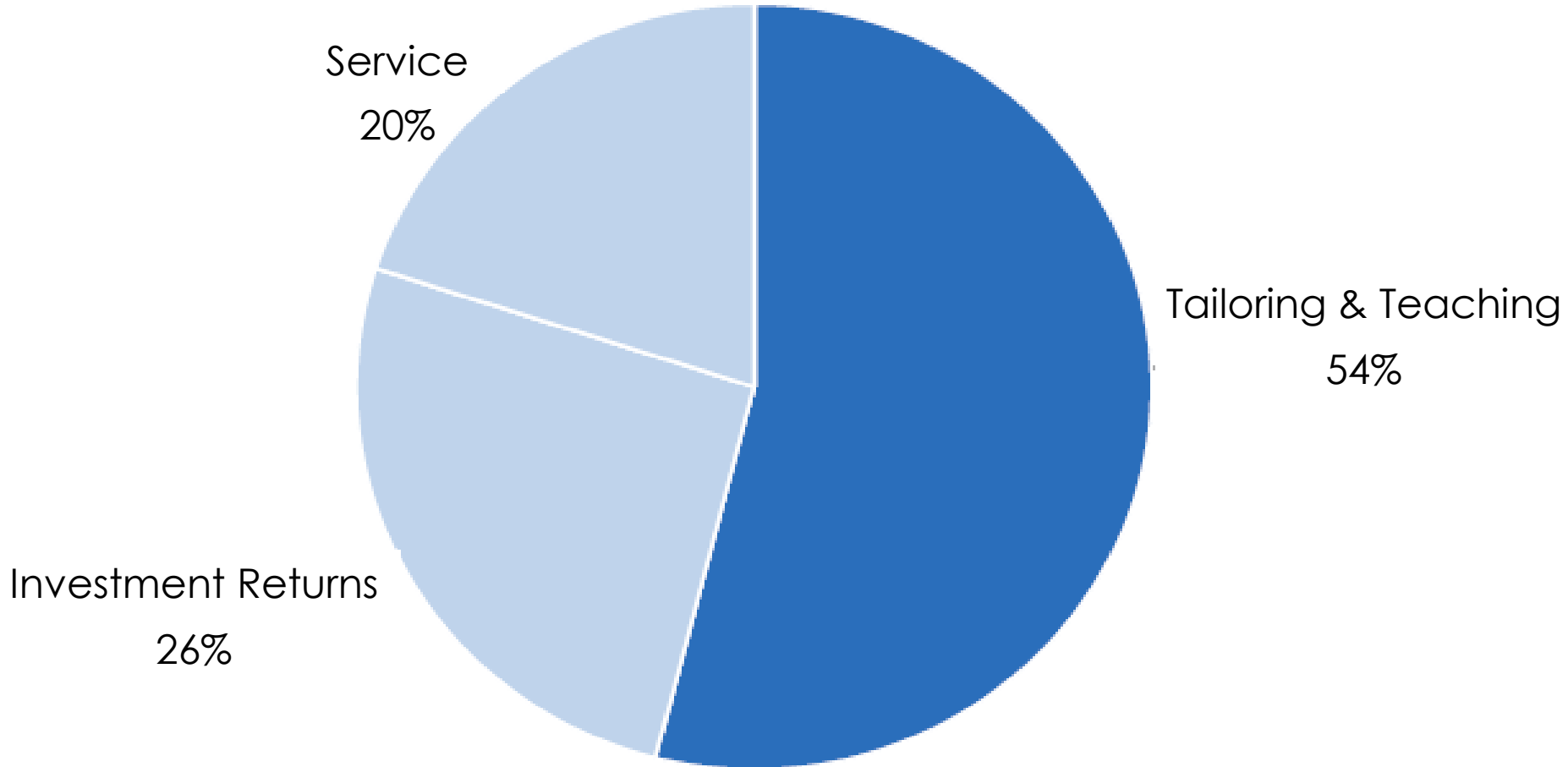
# WHAT DRIVES CLIENT LOYALTY?



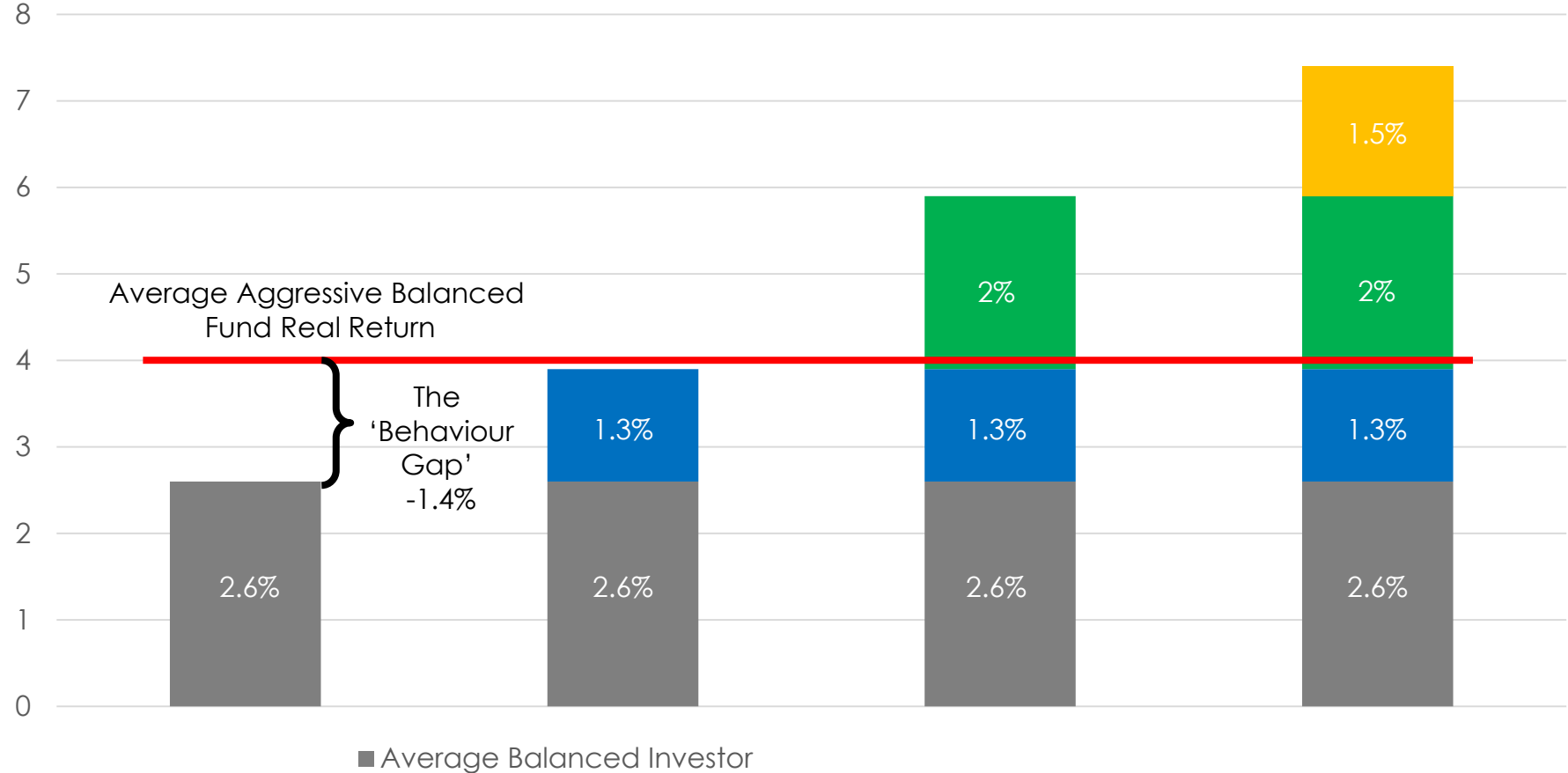
*n* = 4,960 B2B customers of 24 companies.

Source: CEB Sales Leadership Council.

# WHAT DEFINES A GOOD CLIENT EXPERIENCE?



# ADDING RETURNS THROUGH ADVICE



# THE IMPACT OF PERSONAL INVESTMENT TARGETS

Set expectations below  
market indices

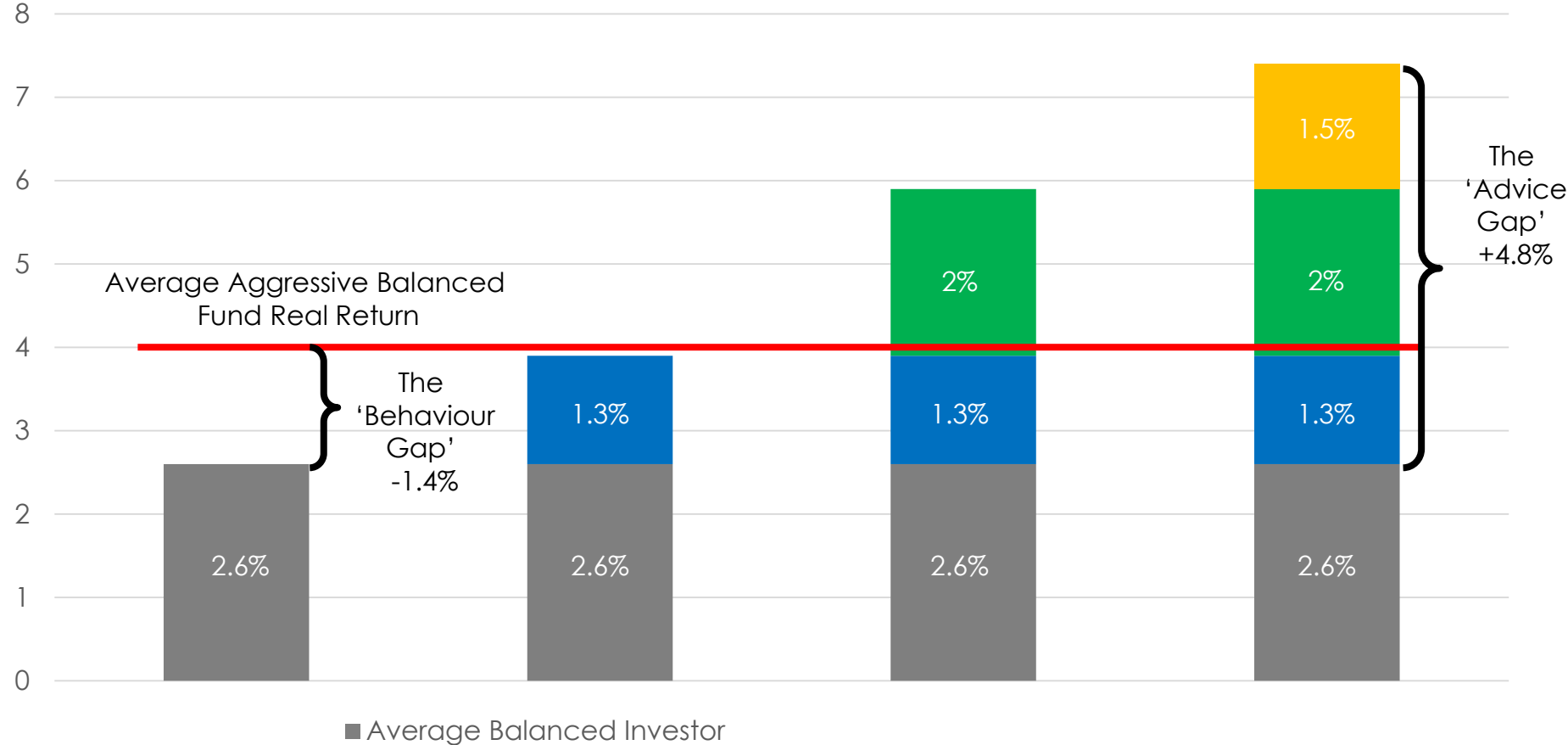
Control exposure  
to risk

**BEST PRACTICES  
TO AVOID  
MONEY-LOSING  
BEHAVIOUR**

Monitor risk  
tolerance

Forecast return  
probabilities

# ADDING RETURNS THROUGH ADVICE

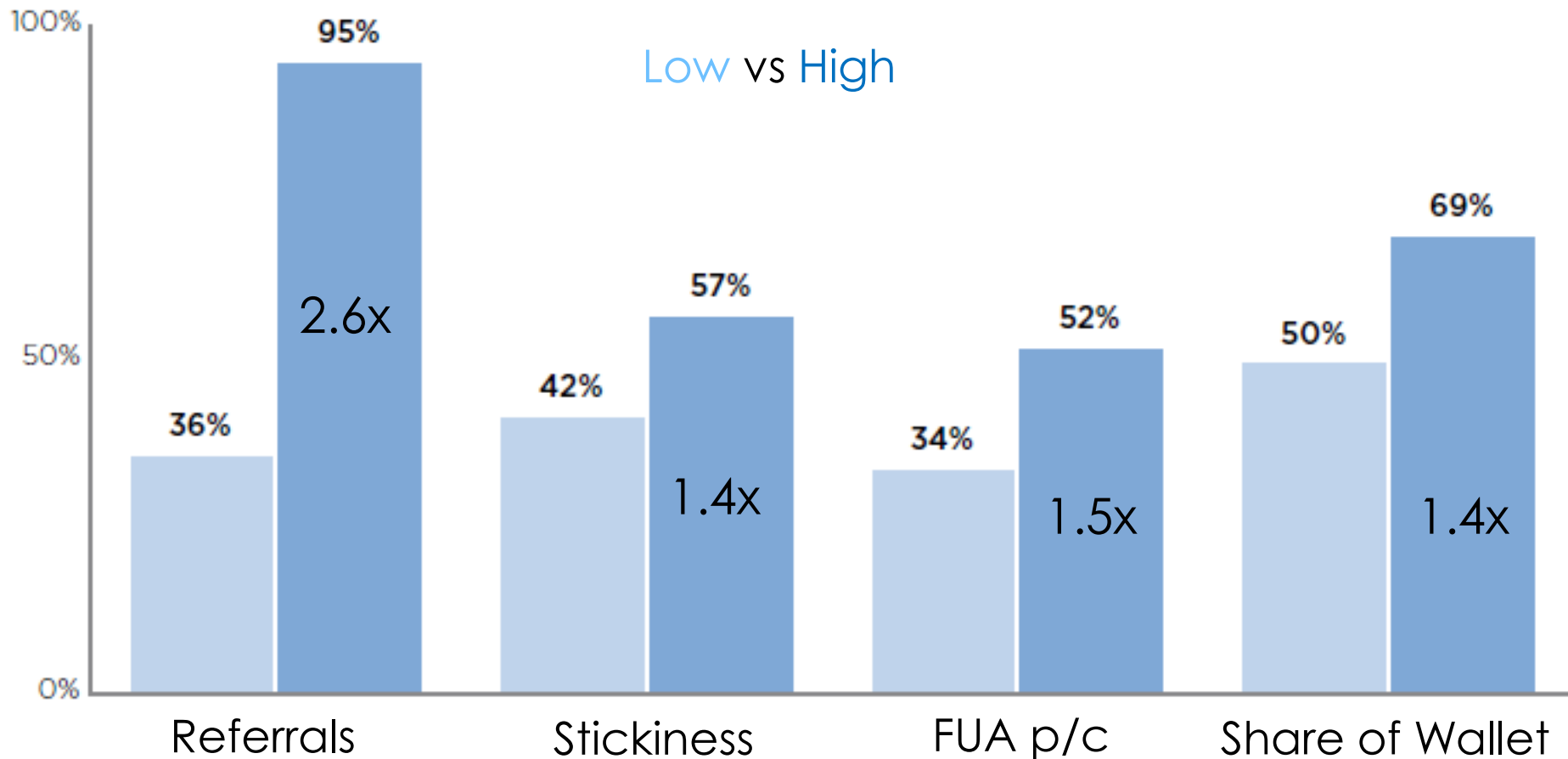


# ENHANCING THE ADVICE EXPERIENCE

# MANAGING CLIENT COMMUNICATIONS



# THE IMPACT OF TAILORING AND TEACHING



# WHAT SHOULD FINANCIAL PLANNERS BE FOCUSING ON?

- Provide a tailored advice experience
- Manage investment expectations
- Communication
- Automation

A grayscale photograph of a sailboat on a choppy sea under a cloudy sky. The sailboat is positioned in the upper right quadrant of the image. The water is textured with small waves, and the sky is filled with soft, diffused light from the clouds.

*You can't change the direction*

*of the wind...*

*but you can adjust your sails*