PROFILER

FINANCIAL SERVICES

IDEAL CUSTOMER
PROFILE KIT

OFFERING

WEALTH MANAGEMENT SERVICES FOR THE GREATER BOSTON AREA

DEMOGRAPHICS

- 50-75 years old
- College educated, nearing the end of their career or already retired
- Over $1M in the bank
- Married with grown children
- Lives in the Greater Boston Area

PRICE SENSITIVITY

- Budget for this type of service: $10K per year
- Ideal price range: $8K to $12K per year

MAJOR INFLUENCERS AND ONLINE BEHAVIOR

- Uses Facebook a few times per week
- To solve financial problems, turns to trusted advisors such as friends with finance experience
- Searches for service providers by asking their friends

PAIN POINTS

- Main challenge: Isn't sure how to successfully handle wealth, but is resistant to relinquish control to a financial advisor
- Worries about having their finances in order before dying or losing the mental capacity to handle finances

HOPES AND GOALS

- Would like to set up their children with money for the future
- Is currently paying for at least one child's university tuition

COMMON OBJECTIONS

- Already works with a financial advisor
- Has difficulty trusting anyone with their finances

DECISION FACTORS AND PROCESS

- Most likely to find out about our services from a referral
- Other options usually considered: X company, Y company
- Normally comes in because they are dissatisfied with their current financial advisor
- Needs real proof of ROI before being convinced

SERVICE USAGE

- Normally reaches out for advice on a case-by-case basis until trust is earned
- After a few months, will consider an annual contract
- Biggest benefit typically seen is greater peace of mind

ELEVATOR PITCH

TAKE CONTROL OF YOUR OWN WEALTH WITH THE ADVICE OF AN EXPERIENCED TEAM OF FINANCIAL ADVISORS. WE'LL EMPOWER YOU TO MAKE BOLD DECISIONS THAT WILL PROTECT YOUR WEALTH, BOTH FOR YOURSELF AND FOR FUTURE GENERATIONS OF YOUR FAMILY.