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Invested In Your Goals

SYMMETRY ADVISOR STRATEGIES

Growth Plan

Practice: ______________________________

Name: ______________________________

Date: ______________________________

Who Do You Serve/Want to Serve?

Exercise 1

Demographics:
Your clients' key info

Age, gender, income, geographic location, marital status

Serve Today

Want to Serve

Psychographics:
Your clients' lifestyle, behaviors, habits

Personality, values, opinions, attitudes, interests

Serve Today

Want to Serve

Niche:
Special business focus

Occupations, skills, organizations, affiliations

Serve Today

Want to Serve

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What Do You Provide?

Exercise 2

Check the top 5 areas your ideal clients tend to focus on and answer questions below:

- [ ] Comprehensive **financial planning**, including budgeting and prioritizing goals--such as paying off student loans or buying a house
- [ ] Making sure client portfolios supports their long-term goals through **investment management**, including consulting on retirement plan options at work
- [ ] Making sure client portfolios support their values through **values-based investing**
- [ ] Protecting clients & their families, including their assets, health, and businesses through **insurance**
- [ ] Helping clients plan and prepare for **educating** children
- [ ] Helping **business owners** protect their business, provide benefits to employees, or buy or sell a business
- [ ] Making sure clients are not overpaying taxes through **tax optimization and tax efficiency strategies**
- [ ] Making sure clients have money to pay for the unexpected as well as ongoing expenses (such as mortgages and student loans) through **cash flow planning**
- [ ] Making sure clients have secure, regular income in retirement through **retirement income planning**
- [ ] Helping clients understand and navigate their options around **Social Security, Medicare, long-term care** and **healthcare directives**
- [ ] Helping clients with **philanthropy** through vehicles such as Donor-advised funds and charitable-remainder trusts
- [ ] Helping clients leave a **legacy** for loved ones and preferred charities through estate planning
- [ ] Working closely with a client's other financial professionals, including their CPA and Estate Attorney, to ensure an efficient and **coordinated approach**
- [ ] Other

Do your clients know you provide these services?

○ **Yes** ○ **No**

Do you regularly discuss the services (or products) you provide?

○ **Yes** ○ **No**

Why Should Clients Work with You? HOW are You Different?

Exercise 3

I am a

who serves

by providing

because I want to

I believe my clients value

Your Current Mission/Value Statement

Does your current mission/value statement reflect who you want to serve today/in the future?

◯ Yes ◯ No

List any changes you want to make to your current mission/value statement:

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1-Page Growth Plan

WHO do you serve/want to serve?

WHAT do you provide?

WHY should clients work with you? HOW are you different?

Growth Goals (should be measurable and specific, with a target completion date)

Goal 1: Date:	Goal 2: Date:	Goal 3: Date:
Strategy A:	Strategy A:	Strategy A:
Steps to Take:	Steps to Take:	Steps to Take:
Strategy B:	Strategy B:	Strategy B:
Steps to Take:	Steps to Take:	Steps to Take:

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Additional Growth Goals

Growth Goals (should be measurable and specific, with a target completion date)

Goal 4: Date:	Goal 5: Date:	Goal 6: Date:
Strategy A:	Strategy A:	Strategy A:
Steps to Take:	Steps to Take:	Steps to Take:
Strategy B:	Strategy B:	Strategy B:
Steps to Take:	Steps to Take:	Steps to Take:

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Please contact us at 800-786-3309 with any questions or for additional information.

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