

# OVERCOMING 4 OBSTACLES TO SUSTAINED ADVISOR GROWTH

Every advisory business experiences growing pains. With margins tightening and competition for top talent at a premium, preparing to overcome these challenges is more important than ever.



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## 1 THE CAPACITY CAP

At some point, meeting existing client expectations prohibits new business growth. For an individual advisor, this threshold often occurs at about \$25 million in AUM. Overcoming this obstacle takes a holistic, long-term approach to technology, talent and resources.

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## 2 THE LEAD GEN LIMITATION

Attracting new clients through broad lead gen services is easier said than done. Advisors should consider putting sales efforts into tailored messages and tactics. A defined financial planning approach can demonstrate value that clients won't find at another firm.

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## 3 THE TECH TRADEOFF

Too often, technology upgrades require a big investment up front, then additional investments down the road. Positioning for growth means focusing on integration and prioritizing solutions that merge financial planning and investment tools.

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## 4 THE BRANDING BREAKDOWN

As clients and AUM grow, branding creates a connected experience firm-wide. It solidifies culture and lays the groundwork for an eventual succession plan. Create consistent, repeatable, scalable processes that reinforce the brand at every client touch point to bring it to life.