

Company Name

Artisan Financial Planning

Date

2012

STEP 1

Company Vision

Vision

What will this company look like after 5 -10 years? What will this company be known for? Use the present tense.

Artisan Financial Planning offers comprehensive financial planning services as well as a full range of financial products and services to help clients reach their financial goals. Our income reaches seven figures and above. Our company bus consists of all the right people in all the right seats. Our clients are well educated regarding our team approach to financial planning which allows the firms principals to take over 150 work-free days per year.

We provide a "one stop shop" for clients who need comprehensive financial planning by offering financial experts in our office that assist clients with every aspect of their financial needs. We offer: Protection Planning, Tax Planning, Investment Planning, Retirement Planning, and Estate Planning.

We attract only Ideal Clients to our practice with \$500,000 plus in investible assets. We share our values and vision with our team and our clients by providing information on our website, in our waiting area, and in conversation. We voluntarily talk about who we are and what we provide. All our planners have the CFP® designation.

STEP 2

Mission Statement

Mission

What is the purpose of this business? Use no more than 1-2 sentences.

Our mission is to help our clients achieve their financial goals and dreams by providing a comprehensive review of our clients' investment objectives, combined with a conservative, long-term approach to investing, and superior service.

STEP 3

Branding

Branding

How will this business differentiate itself in the Market Place? List your strategy to tie your brand and colors into your business cards, tagline, website, blog, and marketing materials.

New 30 Second Commercial describing benefits we provide

Website: Artfully designed top-of-the-line website to attract HNW clients – Greek pillars, images of clouds & dreams in the banner

Colors: Various shades of blue

Tagline: We Invest In Your Dreams

Business Card: Professionally-designed card to match website; printed front and back; detailing services offered

STEP 4 Creating Meaningful Goals

Meaningful Goals

Create goals that are meaningful to you. Add target dates. How are you going to measure your success?

- Convert commission/transaction based revenue to % of AUM for 100 top clients by 8/2012
- Increase average assets per household from \$50K to \$100K by 12/2012
- Gross Revenue \$400,000 2012; \$500K 2013; \$600K in 2014
- Four Ideal Client Interviews monthly
- Obtain one referral from every Client Review appointment
- Begin writing a book “Turning Financial Dreams into Reality” 9/2012
- Follow up with public speaking event attendees within 7 days.

STEP 5 Strategies

Strategies

How will you build this company over time?

- Target three niche markets: 1. Old money families with nonprofit foundations. 2. Successful artists who need help managing their financial success. 3. Pre-retirees in the asset accumulation phase
- Create Ideal Client Profiles – use for target marketing
- Solicit referrals to CPA's, Estate Planning Attorneys, & other professionals while identifying who would be the best partners for our future “one stop shop”
- Penetrate the HNW Artist community - Join the Center for the Arts, join a committee, get on the board
- Plan each day to be extremely effective with Time Management
- Create a Client Service Matrix to effectively service current clients and be worthy of referrals
- Create written Referral Strategy with Follow Up Plan

STEP 6 Marketing Activities

Marketing Activities

Your marketing activities are the actions used to build your business and achieve your Meaningful Goals. Include: Internet Marketing, Referral Marketing, Advertising, Promotions, Publicity, & Customer Contact. Make sure to include Target Dates.

- **MeetUp Group:** create a group “Artists & Wine” with *monthly meetings* – expand prospecting reach
- **Networking:** participate in *semi monthly* Center of the Arts events, weekly Chamber of Commerce events, *monthly* Museum events
- **Website:** opt-in mail list & *monthly* newsletter
- **Ideal Client Interviews:** conduct 4 interviews *monthly* to uncover additional assets and get referrals
- **Paladin's 5 Star Ranking:** provide ranking on our website and link to Paladin's site. Verbalize importance of ranking to current clients and prospects.
- **Public Speaking:** seek out *monthly* speaking opportunities to established groups in our target market
- **Birthday Club Luncheons:** Host luncheons for “A” clients. Invite their ten best friends.
- **Artisan's Book Club:** conduct *two monthly* meetings of our book club with rotating facilitators
- **Press Release:** *monthly* releases about book club, meetup group, & events