



Organic Growth Strategies

- Describe the ideal client.
- What is the ideal client experience you want to deliver?
- Organic growth comes from intentional activity that is consistent and repeatable.
- It takes 7 meetings, on average, to turn a prospect into a client.
- People do business with people they like, trust and need.

1. SET GOALS – Assets Under Management, Revenue, Households

2. HAVE A PLAN – What activities will turn prospects in clients?

3. ACCOUNTABILITY PARTNER – What is monitored and measured is more likely to be achieved.

Organic Growth is a Contact Sport! *Five Point Plan*

Referrals

- Set daily, weekly, and monthly goals for each team member; everyone is accountable for results and rewarded for wins
- Define your ideal client profile
- Ask clients value-focused questions, such as:
 - What do you value most about our relationship?
 - What have been the most impactful decisions we've made together?
- Remind clients that you are always available to speak with their friends or colleagues if they have financial questions or concerns

Client Advisory Council

- Hold quarterly council meeting with 8–12 clients and prospects
- Involve council members in major practice decisions

Events

- Keep experience events small (10–12 attendees) with a mix of clients and prospects
- Use tickets rather than invitations to increase perceived value
- Host quarterly experiential events (e.g., wine tastings, cooking classes, painting workshops, travel-themed events)
- Offer educational events quarterly, value-add sessions directly tied to financial planning (e.g., estate planning, Medicare/Social Security updates, cybersecurity, college planning)

Fish Where the Fish Are

- Be present where your clients spend time—country clubs, restaurants, theaters, etc. Visibility creates opportunity
- Use shared activities (pickleball, Friday golf foursomes, group trips) to build relationships and turn friends into clients and clients into friends

Meal Meetings

- Evaluate how many client meal meetings you hold each week
- Consider hosting roundtable meals with multiple clients or client-prospect groups