

Three Ingredients for Business Growth



Your clients want your time. Your business demands it. You want to grow. What can you do?

LionShare can help. We've consulted with hundreds of advisors to bring you valuable insights. Below are peer-to-peer best practices and resources to help you manage the demands on your time today and grow your business for tomorrow.

The key to organic growth is to dedicate more time to your current and prospective clients and deepen these relationships. This requires three ingredients:

1. Streamlining your investment approach
2. Improving business efficiency
3. Instilling psychological safety

Streamline your investment approach

Recapture meaningful time with a consistent approach. On average, advisors spend over 40% of their time on investments and administrative tasks. This time cost is compounded when you have multiple investment approaches. You end up being reactive and explaining performance instead of proactively leading your team and creating an exceptional experience for your clients.

It's all in the advice

Our LionShare team discusses the benefits of a scalable, repeatable, defensible process to your service model whether you build your own models or outsource.

Whether you decide to create bespoke portfolios, leverage a third party or some combination of the two, it's important to consider the tradeoffs:

- **Time:** Leveraging third-party models maximizes the time you have to focus on and increase the value of your business. The LionShare platform is an excellent resource with Advisors Partnering with Advisors.
- **Control:** Customizing individual client portfolios allows you to retain more control over exposures and capital gains.
- **Oversight:** Picking individual investments requires more due diligence compared to ensuring suitability and appropriateness of third-party models.

Explore model portfolios

Streamline your investment process with a model as your base. Then, customize it with your unique view.

Evolve how you blend

Turn 'active vs passive' into 'index, factors and alpha' to better deliver outcomes for your clients.

Analyze your portfolio

Examine your portfolio across various dimensions and see the potential impact of adjusting allocations.

Improving business efficiency

We've found that advisors with the most efficient businesses generally leverage two key elements: a clearly defined, segmented service model and a team-based approach.

Set realistic expectations. No one can be all things to all clients. Establishing a segmented service model can help you provide realistic expectations for each set of clients against which you can consistently deliver. While building the process is important, actually using it with focus and consistency is the real opportunity.

Top clients, consistent services

Team up. Successful teams start with strong leadership. They look to their leader for purpose, vision, roles and responsibilities as well as accountability. These elements are critical to empower your team to operate effectively and efficiently. Empowered teams have emotional ownership and will maximize their value to clients.

Instilling psychological safety

Coach your team

Conduct consistent and effective one-on-ones with your team to foster emotional ownership.

Hire the best team members

Identify better hires through interviews that incorporate values, cultural fit, skill sets and expertise.

Segment your clients

Establish a scalable, systematic process to serve your clients meaningfully and effectively.

Clients expect you to be their co-pilot, to help them confidently navigate ups and downs, to help them feel safe.

Start with your team. When creating a value proposition, advisors tend to focus first on the client-facing mission statement. But to make that work, your whole team needs to be on board and emotionally invested. Get your team aligned on the vision, core values and operating principles of your business. Only then can you build trust and confidence within your team and with clients.

Tell your story. Advisors often default to using value propositions that tell clients “what I do” or “what I offer.” But, an impactful, business-generating value proposition communicates what your clients can expect: your attention, empathy, and interest in achieving their investment goals. Sharing your experience through stories is an effective way to bring abstract concepts like these to life. Ultimately, your value proposition should highlight how (and why) you earn your fee.

The power of a story

Prospect authentically. As you seek to secure new clients, focus on those who are most like the best clients you currently have. There are many different ways to look for new clients. They’re all common sense, but not always common practice and are rarely applied with the consistency needed to pay dividends. Consider adding one or two of these prospecting ideas to what you’re already doing.

- Use online search engines to identify new homeowners in the area
- Join a local social group
- Partner with estate attorneys or CPAs; ask for a virtual introduction
- Leverage LinkedIn or other online social networks - Digital Marketing
- Host “bring a friend” lunches (consider a LionShare virtual event)
- Give a talk on investing
- Ensure your spouse has the right words to share

Live your story

- Establish your value proposition
- Communicate your value proposition
- Keep the right balance in client relationships

Acquire clients & build loyalty

- Learn to host an impactful client seminar
- Take advantage of resources on:
 - *Psychology of Investing resources*
 - *Women, Wealth and Well-Being resources*
 - *Social Security resources (LionShare virtual event)*

2687 44th Street SE | Kentwood, MI 49512 | 800.357.4757 | regal-holdings.com

FOR INTERNAL USE ONLY – NOT INTENDED FOR GENERAL PUBLIC

Securities offered through Regulus Financial Group, LLC. Member FINRA/SIPC. Investment advisory services offered through Regal Investment Advisors, LLC, DBA LionShare, an SEC Registered Investment Advisor. Registration with the SEC does not imply any level of skill or training. Regulus Financial Group, LLC and Regal Investment Advisors are affiliated entities.