

Advisor Profile

This advisor profile is designed to ensure three important things for you:

1. *your transition is successful*
 2. *you are able to continue your business seamlessly at your new firm*
 3. *you find the perfect fit*
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- Describe your model / go-to-market strategy:
 - [Click or tap here to enter text.](#)
- How many relationships do you currently serve?
 - [Click or tap here to enter text.](#)
- What does this represent in assets under management (AUM)?
 - [Click or tap here to enter text.](#)
- What is the total annual revenue of your business?
 - [Click or tap here to enter text.](#)
- How are you compensated for the work you do? *I.e., Salary/Bonus, Fee-based, Commission?*
 - [Click or tap here to enter text.](#)
- For any of your 'highest value' relationships, do you work with a team? If so, what expertise do they bring? Does the client view anyone else on the team as 'primary contact'? Describe below:
 - [Click or tap here to enter text.](#)
- Regarding your 'most important' / 'highest value' relationships, are you the primary relationship manager?
 - [Click or tap here to enter text.](#)
- In general, do you partner with others inside your organization (commercial banking, etc.)?
 - [Click or tap here to enter text.](#)
- What services do you currently provide for your clients?
 - [Click or tap here to enter text.](#)
- What other services do you wish to provide for your clients?
 - [Click or tap here to enter text.](#)

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High-Level Transition

Households/Relationships % Likelihood to Follow	Number of Households/Relationships in each category	AUM	% in Cash	Revenue
98%	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Not sure?	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Business Plan / Needs to Successfully Transition your 'most important' / 'highest value' relationships

Relationship Name	Product(s)	Pricing	Revenue	Strategy or Needs to Transition the Relationship
Johnson	Managed account	1%	\$83,000	Intro to portfolio manager and planner in first week. Need pricing at or below 1%
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
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Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
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(example)