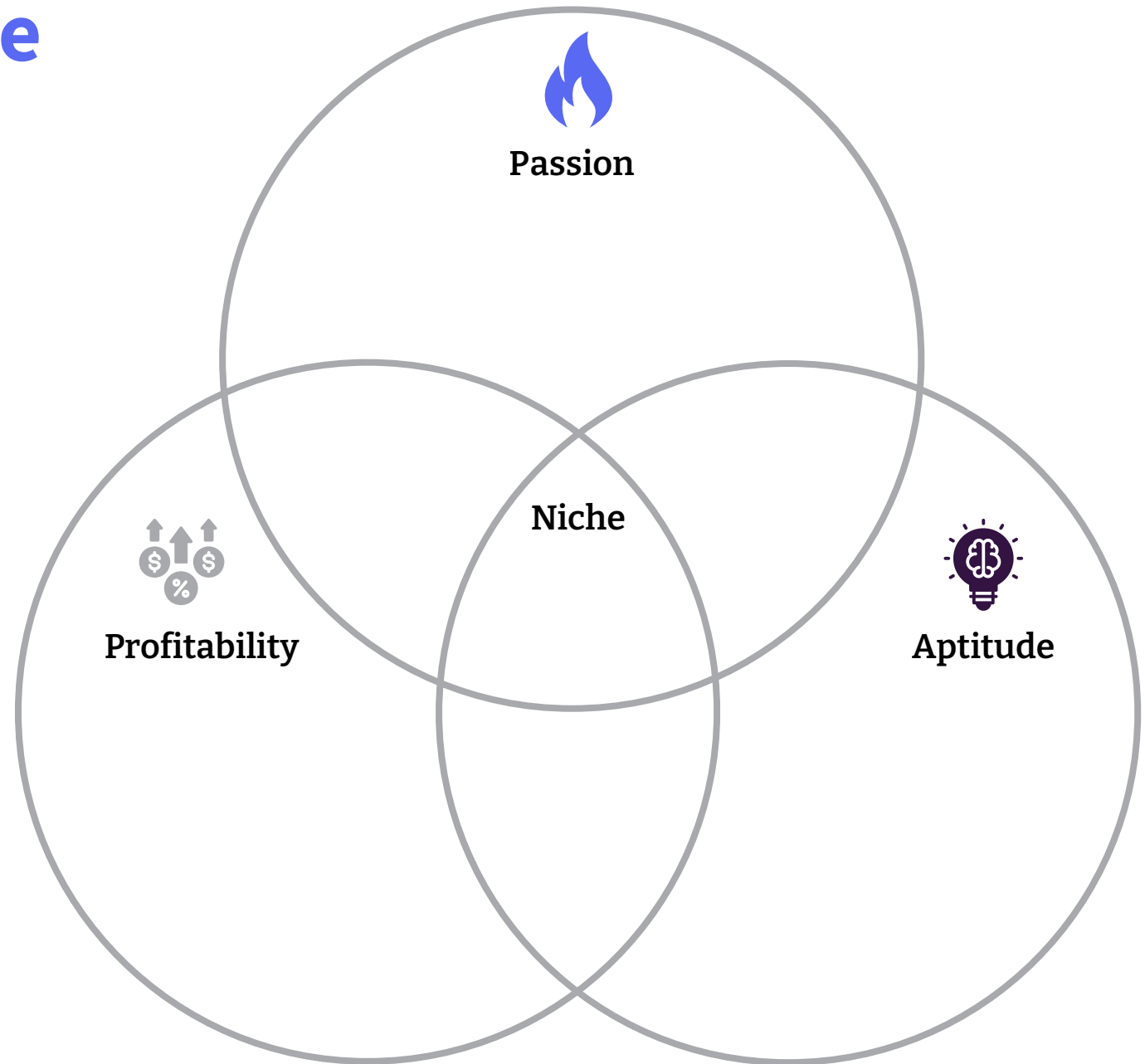


Select a **Niche**

WORKSHEET



Select a Niche

WORKSHEET

 Passion	 Aptitude	 Profitability
• What are my interests and passions? • Who am I passionate about working with? • What type of people do I naturally network with or spend time with? • What would I be doing if I weren't a financial advisor? • Which types of clients are enjoyable and easy to serve? • Is there an industry I have a strong interest in?	• What types of clients do I have experience working with? • What specializations do I have that my clients value most? • What unique educational background do I have? • What types of clients do I have experience working with? • What specializations do I have that my clients value most? • What unique educational background do I have?	• What types of clients have enough income (even if they don't have the assets) to pay for my minimum annual fee? • What types of clients have enough investable assets to meet my minimum account size? • What types of clients, if charged 0.5% of net worth, would meet my minimum annual fee? • What type of clients are most profitable? • What types of clients are naturally attracted to the firm without much effort? • What types of clients are most willing to pay my fees?