ROI Driver Series: Conversion

TIFIN Personality helps advisors get to know prospects' holistic financial personality and forge deeper connections. Invaluable insights inform more personalized proposals and portfolios that differentiate your practice and convert a higher percentage of prospects to clients.

Here's how:

1. **Assessment:** Provide prospects with the Financial Personality Assessment before your first meeting. Learning their preferences, values and risk tolerance will ensure you can tailor the meeting to their needs.
2. **Proposals:** Tailor proposals to each person's specific preferences.
3. **Portfolios:** The platform allows you to take findings from the assessment to create personalized portfolios.

Need help with any of the above? No problem, we have a growing library of short videos and articles showing you best practices. Or contact your Advisor Success team.

Below is a conservative projection of how using TIFIN Personality to improve conversions can help you achieve growth in assets.

Return on Investment Projection for each Advisor

Prospect meetings per month	10
Convert to Clients	50%
Improved Rate of Conversion to Client with Personality	5%
Incremental Conversion Rate	2.50%
Incremental clients per month	0.25
Incremental clients per year	3
Average AUM	$1,000,000
New AUM	$3,000,000
Mgt Fee (%)	1.00%
Mgt Fee ($)	$30,000