ROI Driver Series: Prospecting

TIFIN Personality empowers advisors to continuously generate new prospects through our easy-to-use platform.

Advisors can access new clients by sharing the proprietary Financial Personality Assessment. Here's how:

1) **Email:** Email the assessment to clients as a follow-up to meetings and events.
2) **Social Media:** Share to your LinkedIn, Facebook and Twitter, and ask your connections to share it, too.
3) **Website:** Post it to your practice's website and visitors can fill it out on their own time.

The assessment enables prospects to feel heard and allows you to tailor conversations and proposals to their specific preferences. 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 projection of how gaining 20 responses per month per Advisor to the assessment may help you achieve significant growth in assets.

Return on Investment Projection

Send assessment link monthly via email	5 respondents
Share assessment on social media	5 respondents
Post Assessment to website	10 respondents
=Total Respondents	**20**
Convert to meetings	5%
Convert meetings to clients	50%
New clients/month	0.50
Total new clients/yr from Prospecting	6
Average AUM	$1,000,000
New AUM	$6,000,000
Mgt Fee	1.00%
Mgt Fee	$60,000