



ROI Driver Series: Referrals

Referrals are a great way to grow your client base, but they're awkward to ask for and must be earned. Position your practice for referrals by ensuring that your clients are raving fans of your practice. At TIFIN Personality, we believe a better understanding of what makes each client unique leads to higher satisfaction, which directly drives referrals.

Not sure how to ask? Consider requesting that your favorite clients to share your unique **Financial Personality Assessment** link with their network. That way you not only make it easy for them to connect you to others in their circle, but you're ready to immediately convert prospects. Plus, it's a fun and free quiz that their peers will enjoy taking.

Ready to start generating referrals? You can either provide clients with the ability to send referrals with one click when they complete the assessment by turning on "Referral Mode." You can also ask people to share the assessment by generating an email directly from within the platform.

Need help with any of the above? Your Advisor Success team is ready to help.

Below is a conservative projection of how using TIFIN Personality to help you access more referrals can help you achieve growth in assets. If you have 200 clients that each share the link with only 1 friend, you could generate \$6M in AUM alone. Now imagine them sending to 5 friends...or 10!

Return on Investment Projection

Shared assessments per client per year	1
Shared assessments across all clients	200
Meetings per Assessment	0.1
Convert to Clients	30%
New Referral Clients	6
Average AUM	\$1,000,000
New AUM	\$6,000,000
Mgt Fee	1.00%
Mgt Fee	\$60,000