ROI Driver Series: Retention

What leads to higher retention? Client satisfaction, of course. And TIFIN Personality helps you increase retention by ensuring that each client's investments are personalized based on more than just their risk profile*.

By getting to know clients unique wants and needs better through the **Financial Personality Assessment**, you can:

- Make clients feel seen and heard in a new and differentiated way.
- Tailor investments to interest areas such as ESG, SRI, or even strategies that align with their religious preferences or viewpoints on crypto, China, cannabis, or precious metals.
- Reduce self-directed investments and avoid losing to lower-cost providers.

Act on information all in our easy-to-use platform that can help you create customized portfolios and proposals. We even provide ideas on how to invest in specific interest areas.

Need help driving extreme client loyalty? No problem, we have a growing library of short videos and articles showing you best practices. Or contact your Advisor Success team and they'll guide you through it.

Below is a conservative projection of how using TIFIN Personality can help you improve retention by just 2%, increasing your AUM by $4M per year.

Return on Investment Projection

Current Clients	200
AUM	$ 200,000,000
Current Retention	90%
Incremental Retained AUM	2%
Incremental Retained AUM	$4,000,000
Mgt Fee	1.00%
Mgt Fee	$40,000

* Don't forget that TIFIN Personality has a **TIFIN Risk** risk integration so you can gain a holistic view of each client.