



TIBURON STRATEGIC ADVISORS

Strategy Consultants to Financial Institutions

Financial Advisor Profiles Series

Trusts & Estate Attorney Profiles:
Learning Best Practices by Profiling Leading Firms

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Financial Advisor Profiles Conclusions

Five Best Practices Define Leading Financial Advisor Firms
 Determine Clear Target Markets.....
 Choose Product & Service Offers to Support Chosen Target Markets
 Develop Appropriate Sales & Marketing Methodologies
 Build Necessary People & Technology Support Infrastructure
 Define Business Goals & Develop Written Plans
Fee-Based Financial Advisor & Independent Broker/Dealer Reps Best Positioned for
Success
 Fee-Based Financial Advisors
 Independent Broker/Dealer Reps.....

Benchmarking Categories View

Target Markets
Products & Services
Sales & Marketing
Human Capital
Technology

Profiles of Leading Trust & Estate Attorneys

Estate Attorneys & Other Lawyers.....
 Joe Votava’s Team