

FINANCIAL PLANNERS

Thecasesolution.com

What is a Financial Planner?

Professionals who counsel individuals on their finances

- Help Create Budgets for Retirement Plans
- Give Investing Advice

WHAT ELSE DO THEY DO?

• They help with...
• They help with...
• They help with...

HOW CAN THEY USE TICKETS?

- Meet new clients
- Entertain current clients
- take them to a game to thank them
- Build relationship with business partners to further the business
- give tickets to mortgage specialists, tax accountants
- Generate Referrals

Why sell to Financial Planners?

- expected to be fastest growing occupations over the next decade
- Projected growth rate of 36%
- 73,000 new jobs on top of the current 240,000
- baby boomers retiring in need of financial advice
- Median Salary = \$81,000

FINANCIAL PLANNER BUSINESS PLAN

BEST FINANCIAL PLANNING FIRMS IN THE DC MARKET

Armstrong Fleming & Moore
West Financial Services
Yeske Buie
Cassaday & Company
FJY Financial
Freed Advisors
Chevy Chase Trust
Family Firm
Hightower Advisors
Highline Wealth Management
Sullivan, Bruyette, Speros & Blaney
Bingham Financial Advisory

MY INTEREST TOWARDS FINANCIAL PLANNING

- My own financial reasons
- investing
- cash flow planning
- real estate
- \$\$\$ to spend on tickets

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WHAT ELSE DO THEY DO?

For the sake of time, they focus on the most important items:

- estate, death
- qualified plans, transfer to private plans

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FINANCIAL PLANNER BUSINESS PLAN

1. **Executive Summary**
 2. **Business Description**
 3. **Market Analysis**
 4. **Organization & Management**
 5. **Financial Projections**
 6. **Risk Analysis**
 7. **Conclusion**

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HOW CAN THEY USE TICKETS?



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Some planners do the actual investing

Meet with clients on regular basis to discuss investments

WHAT ELSE DO THEY DO?

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basis to discuss investments

WHAT ELSE DO THEY DO?

- For the most part, they help plan for a comfortable future

also, to help with unexpected expenditures

- untimely deaths
- child needs to transfer to private school

FINANCIAL PLANNER BUSINESS PLAN



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DIFFERENT TYPES OF FINANCIAL PLANNERS



• Fee-Only Financial Planners

- Don't accept commissions
 - minimizes conflict of interest
- Charges flat or hourly fee
- Fee-Based on \$\$ under management
- Many have Minimums

Fee-Based Financial Planners

- Charge an annual fee to manage client's portfolio
- Other revenue streams
 - referral fees for:
 - sending clients to mortgage specialists
 - Commissions on mutual funds
- Many have Minimums