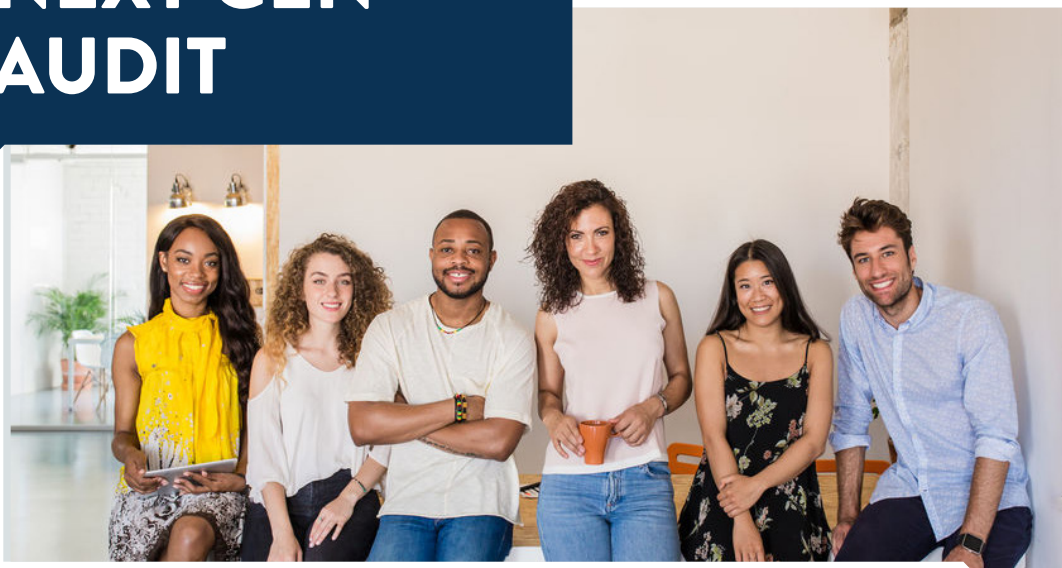
ADVISOR SPEAK

PURPOSE GENERATION

NEXT GEN AUDIT



The Next Gen Audit offers a 360 degree review of your company through a Next Gen lens. We look at everything from your branding and digital experience to your service offering, prospecting strategies, and team formation. The result is a comprehensive report including recommendations on how to futureproof your business and set your team up for success.

ARE YOU READY TO ADVISE THE NEXT GENERATION OF CLIENTS?

Millions of millennials are approaching their peak earning years while navigating major life milestones such as marriage, first-time home ownership, and family planning. The majority admit to lacking the financial know-how and confidence to go it alone and are actively looking for advice.

WHAT WE LOOK AT

The **Next Gen Audit** looks at 5 key dimensions:

1 BRAND & OFFERING

Does your brand resonate with the next wave of wealth?

—

Logo & design
Brand voice & positioning
Company values
Service offering
Product offering
Fee model

2 DIGITAL INFRASTRUCTURE

Do you offer a seamless and integrated digital experience?

—

Website
Mobile
Internal management tools (i.e. CRM)
Other digital tools and integrations

3 MARKETING

Are you investing in the right marketing channels?

—

Content
Social media
SEO
Paid advertising
Referral strategy
Events

4 CLIENT JOURNEY

Is your client journey designed to effectively reach, engage, and retain the next wave of wealth?

—

Prospecting strategies
Onboarding experience
Retention strategies

5 TEAM

Do you have the right talent to capitalize on this opportunity?

—

Recruiting
Roles & Responsibilities
Team profiles

IS YOUR FIRM PREPARED TO ADDRESS THEIR UNIQUE NEEDS?

You have an opportunity to position yourself as a trusted partner to this audience. This next wave of wealth is charting a new path. They are postponing home ownership, acquiring meaningful equity stakes in some of the world's most successful companies, aligning investments with their values, and managing income from multiple side hustles. They are looking for a partner who cannot only deliver results, but who speaks their language.

OUR PROCESS

1

KICK OFF.

Align on the desired outcomes of the audit and gather basic company data through a comprehensive intake survey.

2

DISCOVERY.

Launch research effort across all audit dimensions to identify strengths, weaknesses, opportunities, and/or threats.

3

VALIDATE.

Conduct one or two 60-minute virtual interview with key stakeholders to validate findings and address knowledge gaps.

4

SYNTHESIZE.

Develop final audit report including recommendations on how to build on strengths, address weaknesses, take advantage of opportunities, and minimize threats.

5

SHARE.

Review final audit report.

In order to complete the audit within a 4-week timeline, we kindly ask that you appoint an internal champion who can help ensure all deadlines are met.

WHAT TO EXPECT

We don't believe in a one-size-fits-all solution. Every audit report is tailored to meet your firm's unique needs.

Examples of the types of recommendations you can expect to receive include:

- How to redesign your fee model to be inclusive of the next wave of wealth
- How to create compelling content and use it as a prospecting tool
- How to reimagine your brand values in order to resonate with the next wave of wealth
- How to develop a Next Gen event strategy
- How to implement a client referral program
- A list of recommended digital tools to integrate into your web infrastructure

PRICING

$4,000

Audit fee excludes travel costs. Any additional deliverables that are agreed upon based on the audit recommendations will require a separate Scope of Work.

CONTACT US

Please reach out to us at hello@advisorspeak.com for more information or to schedule your audit today.

PURPOSE GENERATION

ABOUT PURPOSE GENERATION

WE ARE MILLENNIALS. WE KNOW MILLENNIALS.

Purpose Generation is a millennial insights and strategy firm helping brands better understand and engage the next generation of investors, consumers, and talent.

ADVISOR SPEAK

ABOUT ADVISORSPEAK

AdvisorSpeak is a collection of resources to help financial professionals reach, retain, and engage the next wave of clients.

Sign up for our FREE newsletter filled with actionable insights and inspiration to help you win with the next generation of clients.

WHO WE WORK WITH

Our financial services clients run the gamut from the world's largest and most respected financial institutions to top performing RIA's, family offices, and everything in between. We are proud to help these organizations and individuals set a new standard when it comes to serving the next generation of inheritors, investors, and donors.

AARP

Campbell's

WELLS FARGO

Disney

FIFTH THIRD BANK

Morgan Stanley

WELLS FARGO ADVISORS

charles SCHWAB

P&G