

A few traits of our ideal client

- ✓ Has achieved or striving to achieve a work optional lifestyle
- ✓ Decisive and likely to implement our advice
- ✓ Has realistic expectations
- ✓ Is honest with us and fully discloses their assets, values, goals, and concerns...Planning mindset
- ✓ Too busy to/not interested in managing their assets
- ✓ Views us as an investment, not an expense
- ✓ Values our time
- ✓ Willing to pay fairly for our time and expertise
- ✓ Generally optimistic-it's nearly impossible to make a good investor out of a pessimist
- ✓ Active in organizations or associations
- ✓ Charitably inclined
- ✓ Outgoing and social
- ✓ Respected or well-known in the community