

Building Multi-Generational Client Relationships For **Organic Growth**



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The Organic Growth Pivot

Advice firms are moving from growth by addition to a deliberate, repeatable model built around clients, capacity and capability.

1 THE MARKET INTENT

Organic growth is now the priority

64% plan to add new clients

53% plan to grow assets from existing clients

47% say organic growth is a major driver of change

But the model is becoming more selective:

40% have reviewed cost to serve; 44% have switched off ongoing fees for clients who no longer fit.



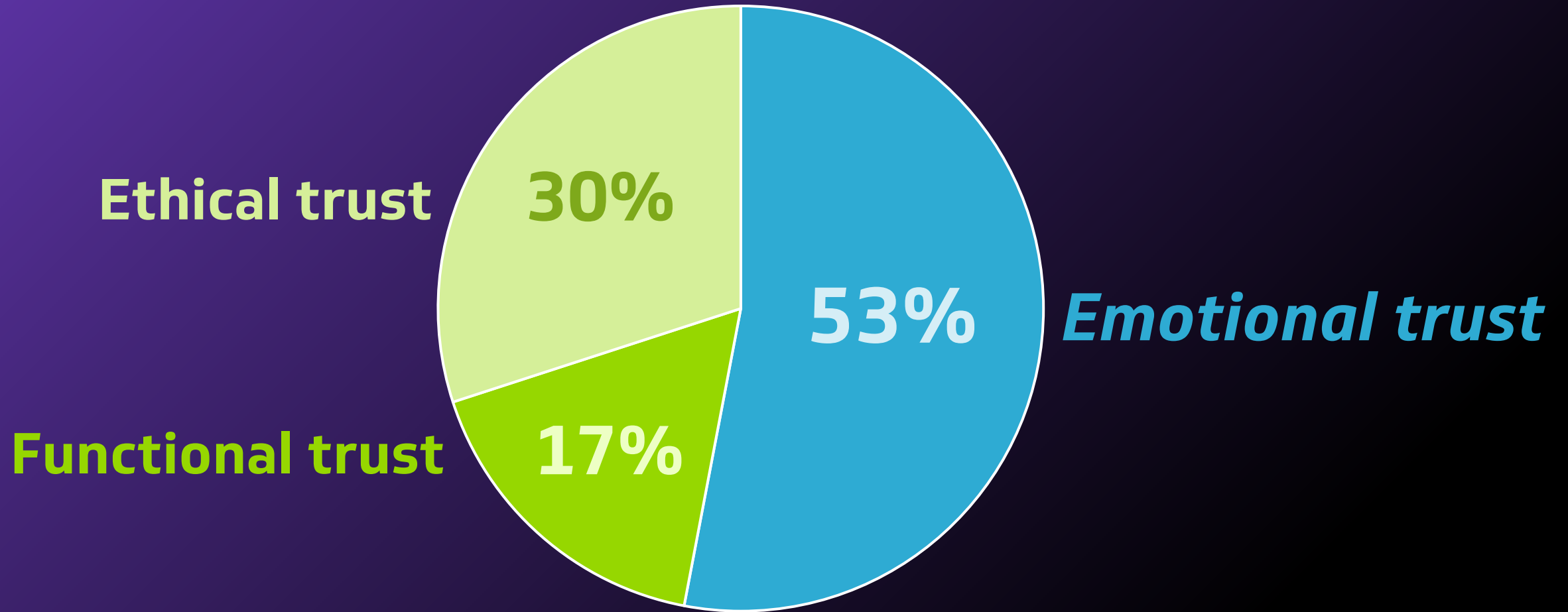
2 HOW ORGANISATIONS PLAN TO DELIVER

- 1 PINPOINT** Use performance data, behavioural science and AI to identify the capabilities and people that drive acquisition, retention and wallet share.
- 2 INVEST** Target development at high performers and high-potential advisers; align hiring, onboarding and coaching to growth KPIs.
- 3 BUILD CAPACITY** Grow people and technology together: 70% expect adviser headcount to rise, while 54% cite technology, cyber and data as leading change drivers.
- 4 BUILD CAPABILITY** Create repeatable playbooks, leadership routines and commercial academies so growth is system-led rather than dependent on individual “heroes”.

THE OUTCOME | A sustainable growth engine that aligns client opportunity, adviser capacity, commercial capability and economics.

Trust in the adviser-client relationship

Trust in an advisory relationship can be divided into 3 components:



Source: Vanguard

The implications of life transitions



PRACTICAL

Things that have to happen or get done



EMOTIONAL

How people feel about the event



FAMILY

How people closely associated are impacted



FINANCIAL / LEGAL

Impacts on finances or legal ramifications

The LERA® Framework



LISTEN

Create space for the whole story



EMPATHIZE

Acknowledge emotions before solutions



REASSURE

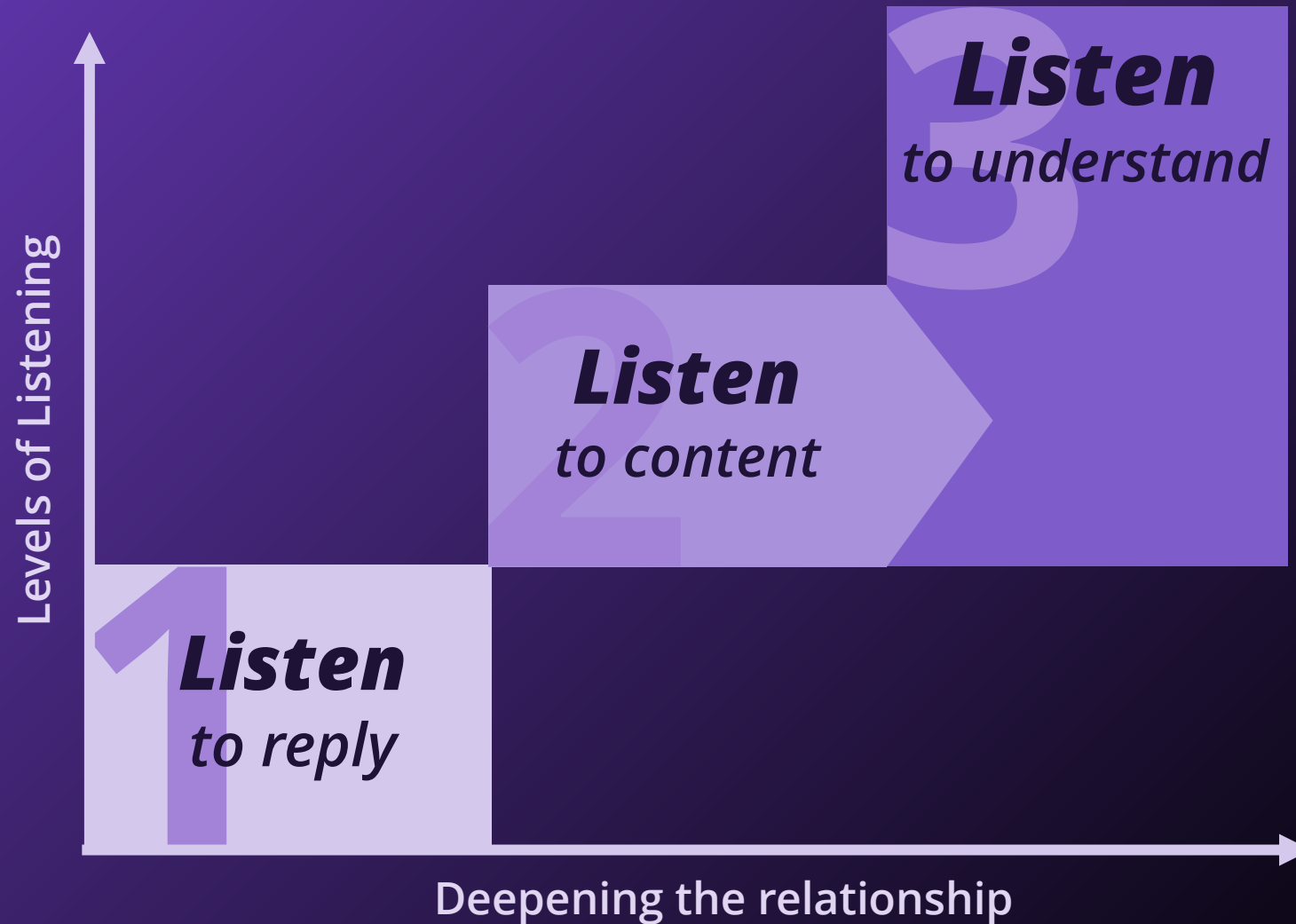
Reinforce they're not alone



ACT

Segue to next step together

LERA® – Levels of Listening



YOUR GOAL IS
Level 3

- What's not being said.
- Beyond the content.
- Ask how they are FEELING about it.
- Watch body language.
- Involve both people.

Deepening Relationships: Empathy

Why is empathy important?

- One of the greatest emotional human needs is to feel heard, seen, and understood!
- When you convey empathy, people feel that you truly “get them”...
 - > That creates greater human connection
 - > And allows for vulnerability



The LERA[®] method in action



LISTEN

"It sounds like you've started thinking about your retirement in terms of longevity – not just the first few years, but the possibility of a long life after working"



EMPATHIZE

"I understand why that may feel stressful; there are a lot of 'what if' scenarios it sounds like you're running. The unknown of that can feel overwhelming."



REASSURE

"The good news is that by thinking now about what you want your life to be like both in the short term and long term of retirement, you can explore options and we can work together to make sure you are prepared financially."



ACT

"As you were talking about traveling extensively in early retirement and preparing for possible future care needs, it occurred to me that we should take a look at your financial plan and see if we need to update it. (Or look at your portfolio and see if we need to change anything about your investments.)"