



PART 4

Marketing to Our Ideal Client

Chapter 1: Marketing to Our Ideal Client

The Pickler Process is the key to our wealth management philosophy. This process is used by the Advisors to explain to our Prospects and Clients why we do what we do and how we do it. The Pickler Process is graphically shown in Appendix B. The process centers on the idea that our advisory service is a combination of Art and Science.

Before the Process begins we must strive to reach those who would be our ideal client.

Section 1: Identifying the Ideal Client: AAA

Our ideal client, the Triple A client, has *Assets* that are sufficient to make the relationship mutually beneficial. They will have a desirable *Attitude*, valuing our services and willing to pay for them. Finally an ideal client will be willing to *Advocate* for us to others and spread the word regarding our unique value.

Our process will still work with a Client who does not fit this ideal perfectly, but the *ideal* Client will not only see their goals come to fruition and their assets grow, but also they will help our Company grow and our Advisors succeed.

Section 2: Our Marketing Approach

Our marketing approach is simple: Retain, Refer, Replicate, the “3 Rs.” The majority of our business is derived from referrals. This is why we want clients who will be willing ... no not just willing, but enthusiastic advocates for us. We want to create Raving Fans of our clients. If a Client is a Raving Fan, they will stay with us. That is the *Retain*. If a Client is a Raving Fan they will *Refer* us to others and our business will grow. Then we *Replicate* the process.

See Appendix B for a more thorough graphical analysis of our Process.