Practice Development Series

Module 9: The Value of Advice / Activity 2 - Review your Value Proposition

Aligned with the PFATM Designation Program

Activity 9.2 - Review your Value Proposition



Activities

Review all versions of your value statement. You may have several variations depending on where and how it is being used. This exercise will help you to understand just how well your value proposition stands out against your competitors. If you find that you use many of the same (or similar) phrases as those given in the list below, your value proposition is not likely doing what it should for you.

1. Write your value proposition here (include all versions):

- 2. How often do you use the phrases (or similar) listed below?
 - Develop a solution that meets your needs
 - Deliver investment management programs
 - Provide comprehensive financial planning
 - Assure your estate planning needs are met
 - Tailor each investment plan to individual needs
 - Act in the best interests of clients
 - Provide a well-grounded investment approach
 - Help clients reach their financial goals
 - Customize our advice to you

