Pathways to Excellence

Sharing the DNA of award-winning Advisers.
AFA White Paper
October 2012

Pathways to Excellence
Insights from leading advisory practices

Consumer's demands are changing and mapping their needs at each step of the journey they share with advisers is now a key approach taken by successful practices.

Powered by
Beddoes Institute
Sponsored by
ZURICH
What do clients want?

- Referral
- Rapport
- Ethical
- Be understood
- Genuine care
- Service
- Tailored unbiased advice
- Transparent fees
- Education & experience
Most critical Building blocks of becoming a leading practice?

- Adviser Qualities
- Advice Process
- Client Service Offer
- Fee Arrangements
Summary

Blueprint for success requires commitment to:

- Enhancing qualities and attributes of advisers
- Enhancing client experience during advice process with new clients
- Optimising service proposition
- Providing transparency and visibility around fees
Thank you