

## **IDEAL CLIENT PROFILE FOR ABC FINANCIAL PLANNING**

- ✓ They are not “do it yourselfers”, they have chosen to delegate their financial affairs to a trusted advisor.
- ✓ People who are enjoyable to be around with a good sense of humor.
- ✓ People who view money and investments as a means to reach their goals.
- ✓ People who value the work and advice of competent professionals
- ✓ Hopeful/Optimistic about future.
- ✓ Young Couples with potential/willingness to accumulate assets.
- ✓ Individuals or Couples in their 30's – 40's with investable assets (> \$200,000) and a desire to grow them.
- ✓ Close to/or Retired couples with sizable assets (\$500,000+).
- ✓ Single/Widowed women, with investable assets (>\$200,000), who need a personal “Chief Financial Officer” to come alongside them
- ✓ Service oriented professionals- (education, non-profit, religious, etc.)