



Jane Attorney

Critical Concerns

Wants to be strategic but no time

Limited time

Billable hours vs. growing practice

Needs larger biz owner clients

Diversify sourcing

Goal: revenue of \$1M+ in 3 years

Highly motivated to grow

On-boarding associate and paralegal

"I want to work with the most successful people."

THE attorney in the biz community

Wants to explore success fees for exit planning

Limited by hourly billing time

Kids' education; charitable foundation

Make a lot more money

Send thought leadership content by email

Clients like email

Not systematic; no follow up

Occasionally emails articles to clients

Intent

Resources

Attributes

JD, Northeastern U., 19 years in practice

Specialties: asset protection, taxation, exit planning

Compensation: hourly, \$275

Annual revenue: \$420K-\$450K

Focus: significantly growing practice

Challenges: lack of time; getting new business

Attracting new clients

More business from current clients

Contacts

22 business owner clients

\$10M+ valuations

Asset protection and exit planning

New clients: networking and client referrals

Rotary and non-profit boards

Three clients in same CEO group > referrals

Husband and sister: business owners with deep contacts

Occasional referrals to FAs

Informal; no follow up

Accountants for tax planning