## STRATEGY 3: WORK WITH THE RIGHT AFFLUENT CLIENTS

## Ideal Client Profile Form

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| **Client Characteristics** | **My Ideal Client** |
| **1. General description**  *(key elements from your client avatar)*  Stage of life (working or retired)  Industry and occupation (if working)  Specific job and company (if working)  Marital status  Education level  Age range  Other factors |  |
| **2. Geographic location** |  |
| **3. Amount of investable assets** |  |
| **4. Minimums**  Minimum assets under management  Minimum fee |  |
| **5. Financial challenges** |  |
| **6. Source of client** |  |
| **7. High-net-worth personality**  Most compatible type  Most profitable type |  |
| **8. Passion and commitment** |  |