## STRATEGY 3: WORK WITH THE RIGHT AFFLUENT CLIENTS

## Ideal Client Profile Form

|  |  |
| --- | --- |
| **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 statusEducation levelAge rangeOther 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 typeMost profitable type |  |
| **8. Passion and commitment** |  |