What Affluent Clients Want from Their Financial Advisor

Provided by: Resonate, Inc.
September, 2014

According to Matt Oechsli, founder of The Oechsli Institute, current research verifies that the affluent client seeks exactly what Resonate is committed to deliver.

Here is a convenient breakdown of this crucial information which fits into either a “Communications Bucket” or a “Financial Services Bucket”.

In the Financial Services Bucket, clients want:

1. A solutions provider with access to specialists. This means a “go-to” company who quarterbacks the comprehensive process. Recognizing the complexity of planning, the client expects the advisor to coordinate and to respectfully collaborate as needed with other carefully selected professionals.
2. To create a customized financial plan, implement it and keep it current through consistent review and realignment.
3. To maintain their desired lifestyle currently and throughout retirement.
4. To protect their families’ investments from unnecessary downside risk.
5. Investment performance aligned with expectations. Advisors must have the skills to create clear expectations.
6. Full disclosure regarding fees.
7. Their advisory firm to offer outstanding technology.
8. The advisory firm to manage and coordinate the flow of required paper documentation.

In the Communications Bucket, clients want:

1. Advisors who truly listen and commit to understand their families’ needs.
2. Trustworthy advisors who consistently put the best interest of the client ahead of their own.
3. Advisors who can clearly communicate from the depth of their technical knowledge.
4. Advisors who create fresh, personalized and timely material as opposed to “canned or pre-packaged” communications.

In addition to delivering what clients want, for thirty-five years, Resonate has also committed to holding the highest standards for ourselves. To this end, these are characteristics which we believe must be at our core.

They are:

1. Discipline
2. Honesty
3. Integrity
4. Awareness
5. Lifelong Learning.

RESONATE Inc.
Connecting Client-Centered Financial Planning and Lasting Legacies

Resonate, Inc.
8837 Chapelsquare Drive
Suite B
Cincinnati, Ohio 45249
(513) 605-2500
www.resonatecompanies.com