

### **What I got:**

Identify target areas for growth based on what is working now: example target areas are:

- Three best referral sources are CPA's, so set a goal of creating three new CPA relationships
- Focus on charitable giving, so focus on charitable giving niche
- 40% of top 10 clients are executives with stock options, so tailor marketing handouts to executives with stock options
- Identify any new or potential target areas

### **What I did:**

Identify target areas for growth based on what is working now, such as:

- CPAs, who are the best referral sources. Set a goal to create three new CPA relationships.
- The charitable giving niche
- Executives with stock options, who comprise 40% of the top 10 clients

[Identify any new or potential target areas is redundant. Delete.]

### **What I got:**

- Having a thriving practice based on marketing requires tenacity as much as talent. Additionally, you need to make good use of your key resources (time, staff and resources).

### **What I did:**

- Having a thriving practice based on marketing requires tenacity as much as talent. Additionally, you need to make good use of your key resources (time, staff and [redundant. How are these different? Does the second "resources mean something else?]).

### **What I got:**

- Your greatest marketing investment is your time, not money
- Your most significant investment is marketing materials and specialized events

Your greatest marketing investment is your time, not money

Your most significant investment is marketing materials and specialized events

["greatest" and "most significant" cancel each other out. Which one is the most important?]

**What I got:**

The most common reasons we see for an advisor's failure to design and implement effective marketing include the following:

- They attempt to do too much
- They do not distinguish between systematized and specialized marketing
- .
- .
- They fail to implement

**What I did:**

The most common reasons we see for an advisor's failure to design and implement effective marketing include the following:

- They attempt to do too much
- They do not distinguish between systematized and specialized marketing
- .
- .
- They fail to implement

See how this is redundant?

