



A more successful financial relationship

Moneyball for Advisors

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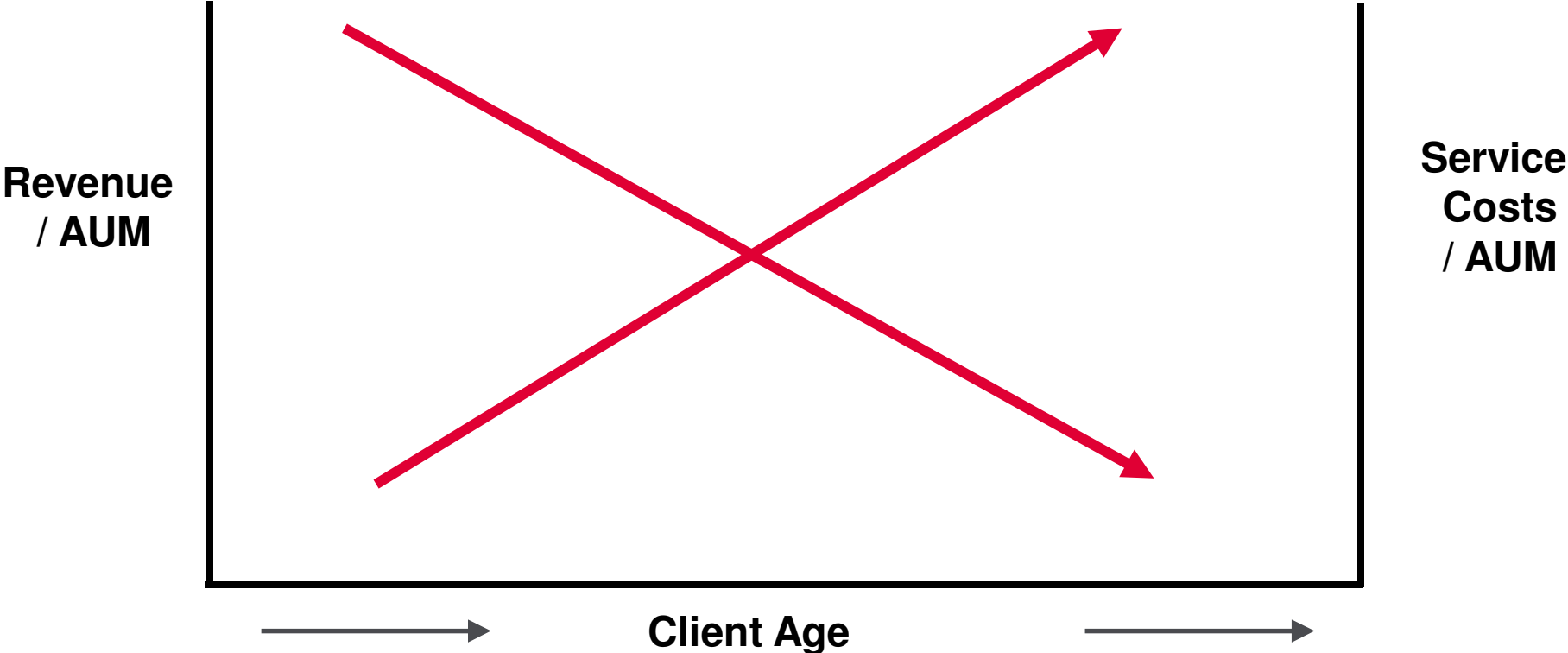
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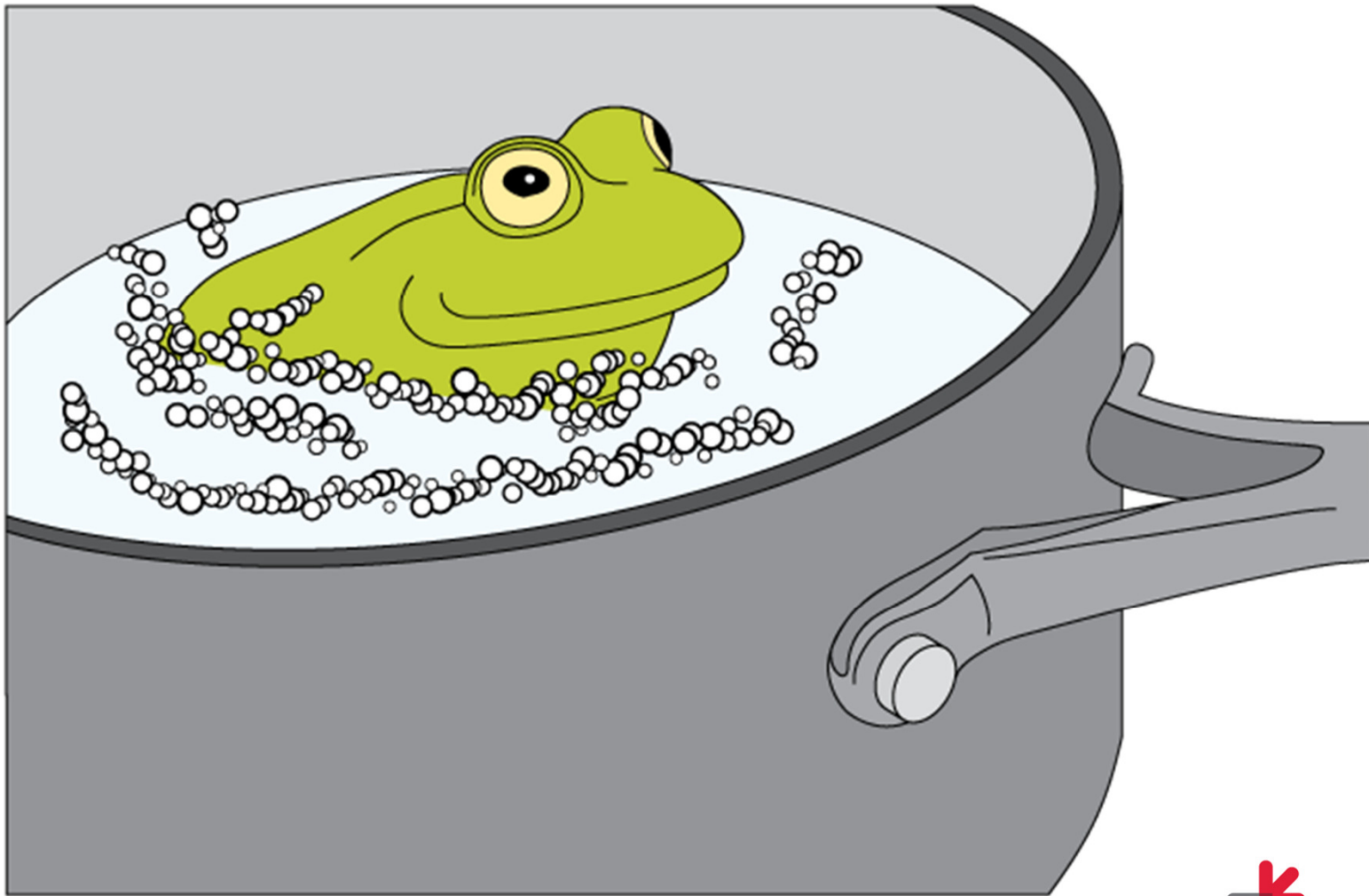
Seven questions...

1. Can you define the demographics of your client base? And, can you accurately predict the effect that these demographics will have on your assets, revenues, profitability and sale value of your practice?
2. What percentage of your clients provide you with referrals?
3. What percentage of referrals made to your business did you actually meet?
4. What is the ROI on your current marketing efforts?
5. Do you believe the internet is having an effect on Canadian Investors? Are you being “Google’d” and if you are can you be found and what do people see?
6. Are you in control of the momentum of your business?
7. Do you spend enough time working “ON” your business compared to working “IN” your business?

Demographics and facts...



Is this you?



Economics of Loyalty

66, 20, 2

Economics of Loyalty

18=100



Feedback = Moneyball

The magic question...

For the article on female clients from **Investment News**

OR

A copy of our **Economics of Loyalty** whitepaper

OR

Some **ideas** on how to '**Moneyball**' your business

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