



The Essential Advisor: Building Value in the Investor-Advisor Relationship

Bill Crager, Jay Hummel

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The Essential Advisor: Building Value in the Investor-Advisor Relationship Bill Crager, Jay Hummel Leverage the financial services evolution to maximize your firm's value

The Essential Advisor presents an insightful handbook for advisors looking to navigate the changing face of financial services. The industry is evolving, consumers are evolving, and many advisors are being left behind as old methods become less and less relevant. This book shows you how to turn this shift into a positive, by positioning your firm to maximize these new opportunities, and deliver the results and experience increasingly expected of financial advisors. You'll learn how to provide the transparency, hands-on interaction, and around-the-clock access today's clients demand, and how to consistently deliver service that robo-advisors cannot duplicate. Emerging technologies do not have to be a threat to your practice—they are tools that represent opportunities to provide greater service to your clients, and smart technology integration will be a hallmark of firms that survive the shift. This guide provides a clear vision of the future of financial services, and an indispensable management framework for maximizing your firm's future value.

Advisors are increasingly confused about what clients are seeking, and clients are equally confused about what advisory firms offer that alternatives cannot. This book helps clear the air on both sides by examining the client's perspective of financial services, and helping advisors better communicate their strengths.

- Articulate the value of your services
- Leverage new technology to complement your practice
- Capitalize on opportunities and maximize your firm's value
- Position your firm to benefit from the changing consumer population

Financial advisors can only grow their businesses if clients know what they do, know how to hire them, and can access them affordably. *The Essential Advisor* shows you to bring your firm into the future successfully.

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