

What do your top clients have in common? (In Search of Your Ideal Client)

This worksheet will help you uncover why people are attracted to you and why you are attracted to them. By understanding the common denominators of your current top clients, you will begin to formulate what your Ideal client looks like. In thinking about the ideal client, you should consider their markets, geographical boundaries, affluence, referrability, likeability, credibility and values. Financial numbers/metrics (net worth, income, investable assets and annual practice revenue) should also be taken into consideration.

Characteristic	Client #1	Client #2	Client #3	Client #4	Client #5	Client #6	Client #7
Demographics							
Age Group							
Gender							
Married/Single							
Widowed/Divorced							
Retiree							
Number of Children							
Special Needs Children							
Supporting Aging Parent(s)							
Affluent Neighborhood							
Home Town Area							
Financial							
Income							
Net Worth							
Investable Assets							
Main Investment Category							
Risk Tolerance Level							
Transactional Client							
Financial Planning Client							
Wealth Management Client							
Fee Based/Commission Based							
Annual Revenue From Client							
How was Client Acquired?							
Has Client Provided Referrals?							
Does Client have Other Advisors							
Psychographics							
Fun							
Easy to Work With							
Accepts Advice Well							
Implements Advice							
Cares About Others							

What do your top clients have in common? (continued)

Characteristic	Client #1	Client #2	Client #3	Client #4	Client #5	Client #6	Client #7
Education Career							
Education: Where? Major							
Alumni Affiliation							
Career Roles & Titles							
Business Owner/Self Employed							
Professional/Trade Associations							
Hobbies Activities							
Clubs & Organizations							
Civic/Community Involvement							
Health & Exercise Concerns							
Recreational interests							
Sports Interests & Participation							
Spouse's Participation							
Team Affiliations							
Children's Participations							
Favorite Charities / Causes							
Volunteer Activities							
Other Traits/Characteristics							
Cuisine Preferences							
Favorite Restaurants							
Favorite Retailers							
Personality Style							
Pets							
Travel Interests							
Wine Preferences							
Political Viewpoints/Affiliations							
Religious Preference							
Other							
Other							