



BEST PRACTICE CASE STUDY

The State of Client Understanding

DEVELOPING CLIENT
NICHES & COMMUNITIES

SignatureFD, LLC
Atlanta, GA USA

SIGNATUREFD

Financial Design for Life

Developing Client Niches & Communities

“What we want to do as individuals and as a business is positively impact people’s lives and then help them impact the lives of others. This goal and alignment of purpose guides our approach to financial design and is a driver behind our vision of building communities. These communities help guide our understanding of what different people value and the areas in which they need help. They are also an important part of how we grow, serve and live with intention.

Heather Robertson Fortner, MS, IACCP®

Partner, Chief Operating Officer and Chief Compliance Officer
SIGNATUREFD, LLC



SignatureFD invests in building communities around target client niches and special interest areas to provide clients with opportunities to engage with like-minded people and receive specialized support in reaching their financial life goals.

Why we like it:

SignatureFD's efforts in cultivating client communities have been a win-win scenario-creating more value for clients (e.g., more tailored, valuable offerings) and more value for the firm (e.g., greater efficiency, depth of client understanding, and differentiation).

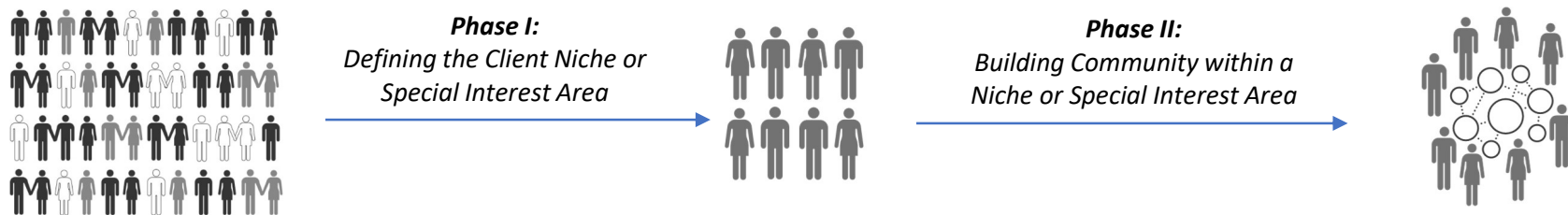
The communities themselves help provide a means for clients to directly realize core personal values reflected in their plan (e.g., connection, contribution, creativity).

OVERVIEW OF SIGNATUREFD COMMUNITIES

SIGNATUREFD

Financial Design for Life

SignatureFD has created a portfolio of initiatives designed to address the needs of distinct client segments with tailored service offerings and community-based resources and opportunities



Niche & Special Interest Initiatives*

Executives	SignatureEXEC®
Attorneys	SignatureLAW®
Professional Athletes	SignaturePRO®
Doctors	SignatureHEALTH®
Business Owners	SignatureENTREPRENEUR®
Philanthropy	SignatureGENEROSITY®
Women's Issues	SignatureWOMEN®

Sample Community Nurturing Efforts

- Hosting educational and personal development events
- Recruiting clients to serve as leaders in a community Client Advisory Board
- Organizing social and networking events

Value to Client:

- Feels understood
- Gets support for specialized needs

Value to Firm:

- Increased depth of understanding
- Increased efficiency
- Increased value differentiation
- Increased referrals
- Increased advisor satisfaction (aligning track with passions)

Multiplier Effect

Communities amplify value creation on all dimensions

**Note: at the core of each niche and special interest initiative is a depth of specialized knowledge and experience in serving the unique needs and requirements of a sufficiently large and homogenous group of clients.*

SignaturePRO® is an example of a successful community that is addressing an under-served client niche

Niche

Professional Athletes and their families



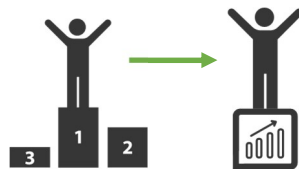
Identifying and Understanding the Niche

In working with a number of professional athlete clients, SignatureFD discovered important similarities in the transitions and challenges this community faces—and how to help clients navigate.

“Anyone who makes it to becoming a pro athlete is thrust head first into an entirely different life, including money, celebrity, and business opportunities. And, once the game ends for good, a lot of pro athletes face another sharp, abrupt transition and have a hard time figuring out life afterwards. We knew there was a community here that we could serve.”

Core Value Proposition

Help clients create a game plan for post-sports life



Defining the Value Proposition and Offering

SignatureFD offers financial planning & consulting, roundtables & workshops, and educational content tailored to the needs, circumstances, and strengths of pro athletes.

“Our core value proposition for SignaturePRO® is equipping athletes with the tools, guidance and support they need to achieve success in life both in and outside of their sports career.”

Community Development

Foster community among former athletes seeking to redefine their identity and financial lives



Nurturing Community and Building Momentum

Being an active member and steward of the community is an integral part of the SignaturePRO® value proposition; sample community nurturing efforts include content and events that touch on critical topics for pro athletes to consider before they end their sports career, including:

- Foundational and niche-specific wealth management education
- Developing a business network
- Personal branding



SignaturePRO® Initiative Landing Page

SIGNATUREFD

[HOME](#) [ABOUT US](#) [BLOG](#) [EVENTS](#) [CAREERS](#) [CLIENT LOGIN](#)



SIGNATUREPRO
a community of SIGNATUREFD

You excel on the field. What's the game plan for the rest of your life?

Banner of SignaturePRO® Initiative landing page

SignaturePRO® Initiative Landing Page

SIGNATUREFD

HOME ABOUT US BLOG EVENTS CAREERS CLIENT LOGIN

Life outside of sports can be filled with freedom and more time, but also uncertainty. Without the routine of training, workouts, and position group meetings, what's your next move? And who are you outside of the lines?

A number of high profile former players shared with us how valuable it would have been, and now is, to work with a team that can help them maximize their time, take control of their financial life, and make a bigger impact on the relationships that are most important to them.

By fostering a community of athletes and creating growth opportunities, SignaturePRO can help you redefine your identity, build a business network, and acquire a financial team that will provide far more than a financial plan. We are a complete action team that will help you build a game plan to live your post-sports life with intent and impact.



The Players' Journey



How We're Helping

Content of SignaturePRO® Initiative landing page

The left video includes several former professional athletes' perspectives on their unique financial issues alongside SignatureFD's message on how they can help.

SignaturePRO® Initiative Community Engagement



SignaturePRO® Locker Room Series: Workshop on business development techniques



SignatureFD's Rob Vaka on a panel at the Atlanta Business Chronicle "Business Sports Summit"

BENEFITS TO SIGNATUREFD AND CLIENTS

SIGNATUREFD

Financial Design for Life

The ongoing development of client niches & communities has many benefits for SignatureFD and its clients

"We help NFL players and professional athletes make the transition from sport to life because there are so many pitfalls. And, we're here to help them avoid the pitfalls."

Rob Vaka
Director of Client Engagement
SignatureFD, LLC

"Our communities provide innovative opportunities for team members to grow in areas that they are personally interested in and passionate about. It has been a big source of engagement for our team and helps create a sense of our firm being a community in itself."

Heather Fortner
Partner, Chief Compliance Officer and
Chief Operating Officer
SignatureFD, LLC

Business Impact:

- Active communities derive twice as much new business from client referrals and events as inactive communities.
- More than 80% of client referrals come from clients in active communities.
- More than 95% of new business derived from events comes from active communities.



General principles from SignatureFD on how to promote and nurture healthy, active niche communities

- 1) **Do your research:** make sure you understand the unique needs of the communities you are building
- 2) **Have the right leader:** the best financial advisor does not necessarily make the best community leader
- 3) **Make it tangible:** the communities should not be differentiated in title alone, but provide real, meaningful offerings that are specific to that group
- 4) **Focus on the client-to-client connection:** facilitate opportunities for community members to interact and establish relationships with others in their community
- 5) **Make it fluid:** these communities are designed to meet clients where they are in their life – which changes over time
- 6) **Create a sense of community at the office:** an office environment with open formats and common areas for congregating can help generate a sense of community (and communicate that to clients)
- 7) **Leverage people's passions:** allow team members to follow the path that aligns with their passions so they are excited about the clients they are serving

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