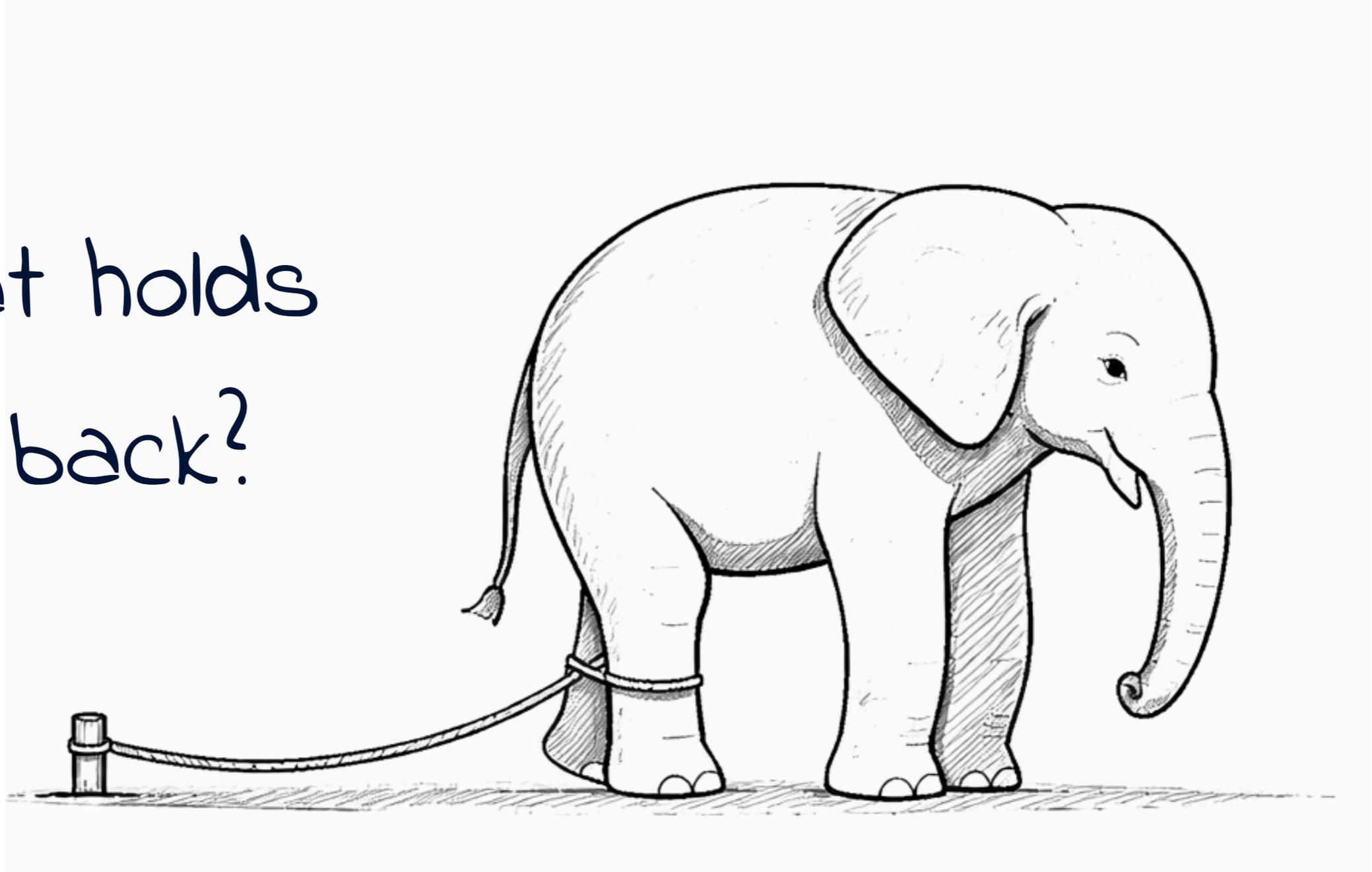
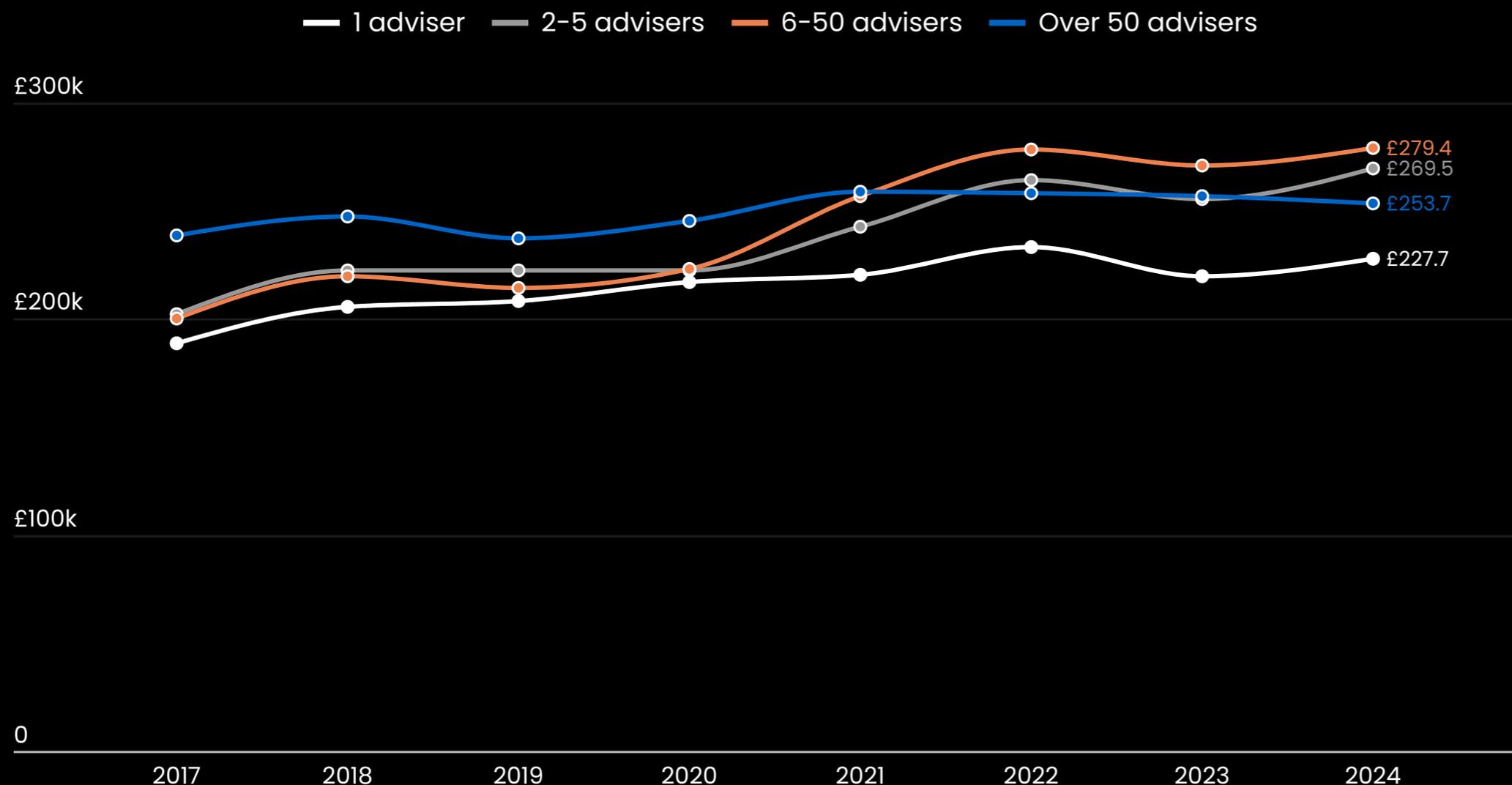


The Inner Game of Growth

What holds
us back?



Revenue per adviser



£275k

Mid (6 - 50 RIs)



£270k

Small (2-5 RIs)



£254k

Large (50+ RIs)

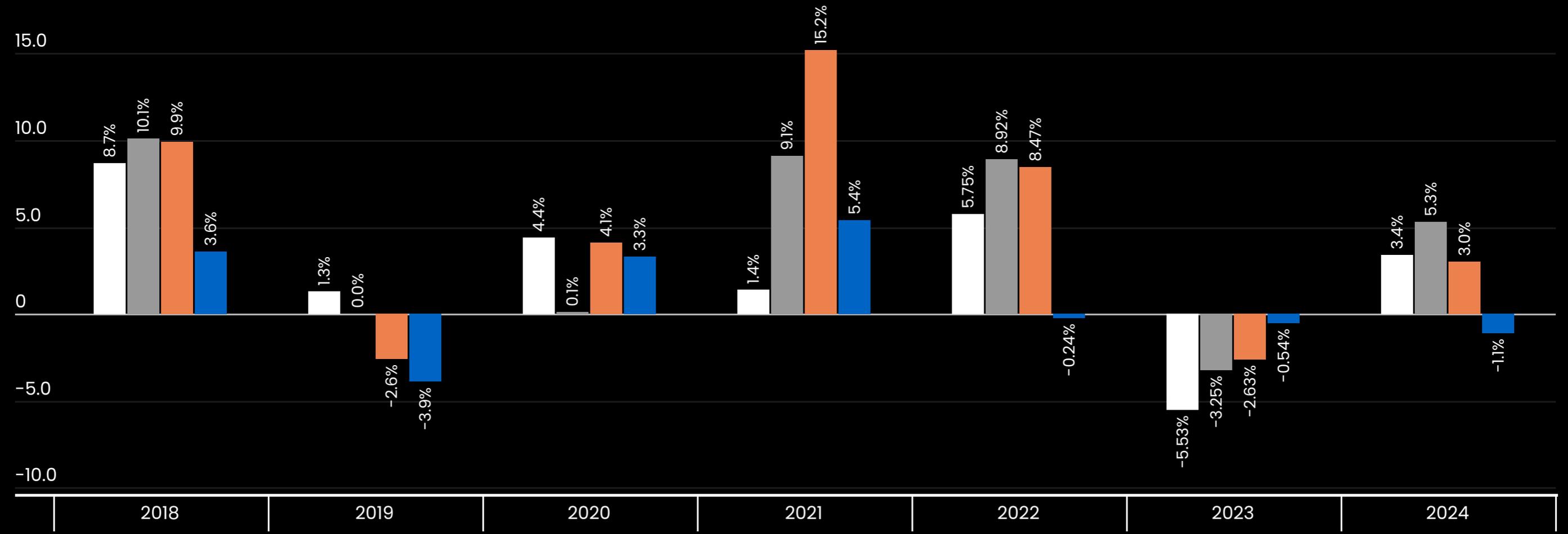


£228k

Solo adviser

Revenue Growth

— 1 adviser — 2-5 advisers — 6-50 advisers — Over 50 advisers

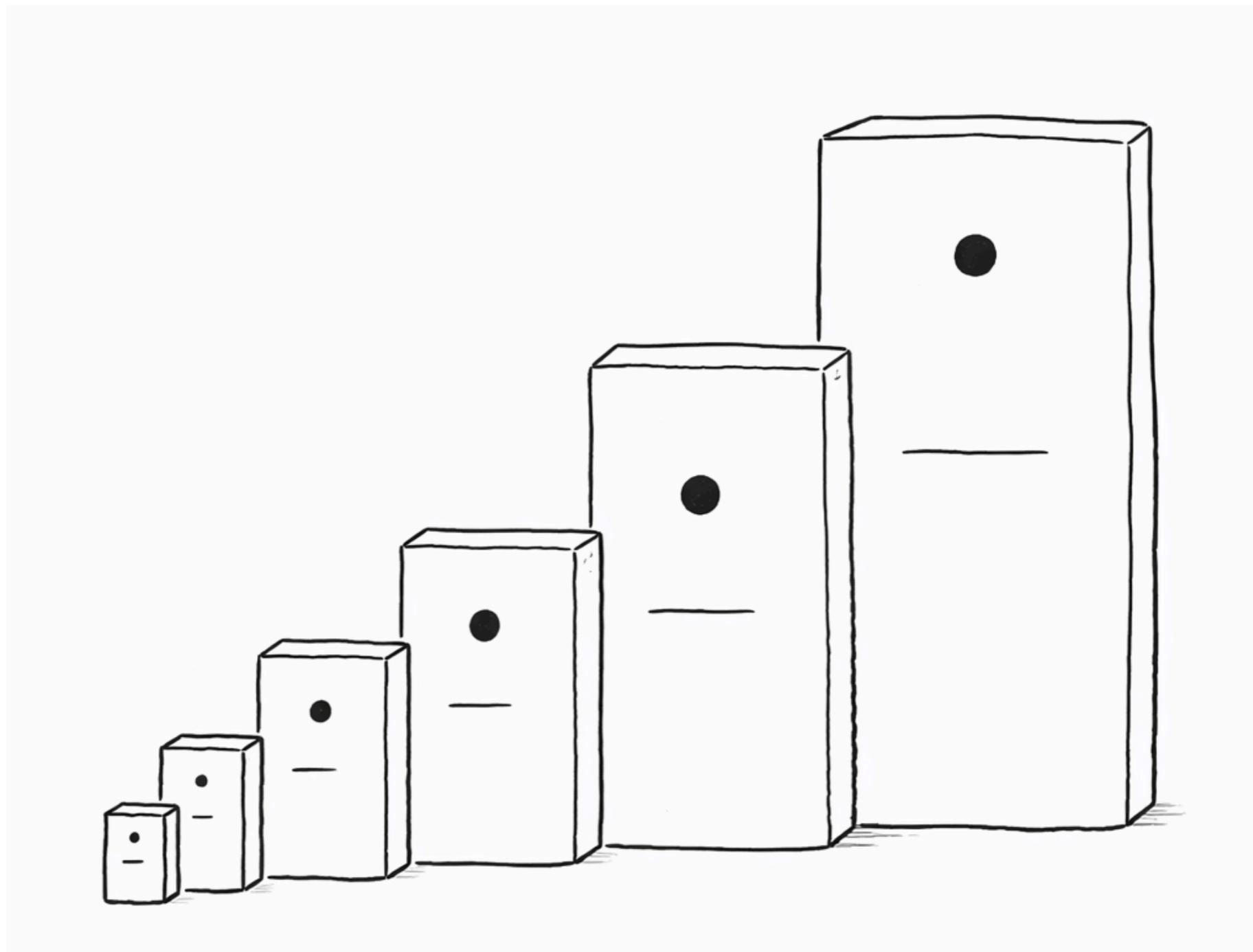


Sources: FCA Retail Intermediary Market Data (2015- 2024)

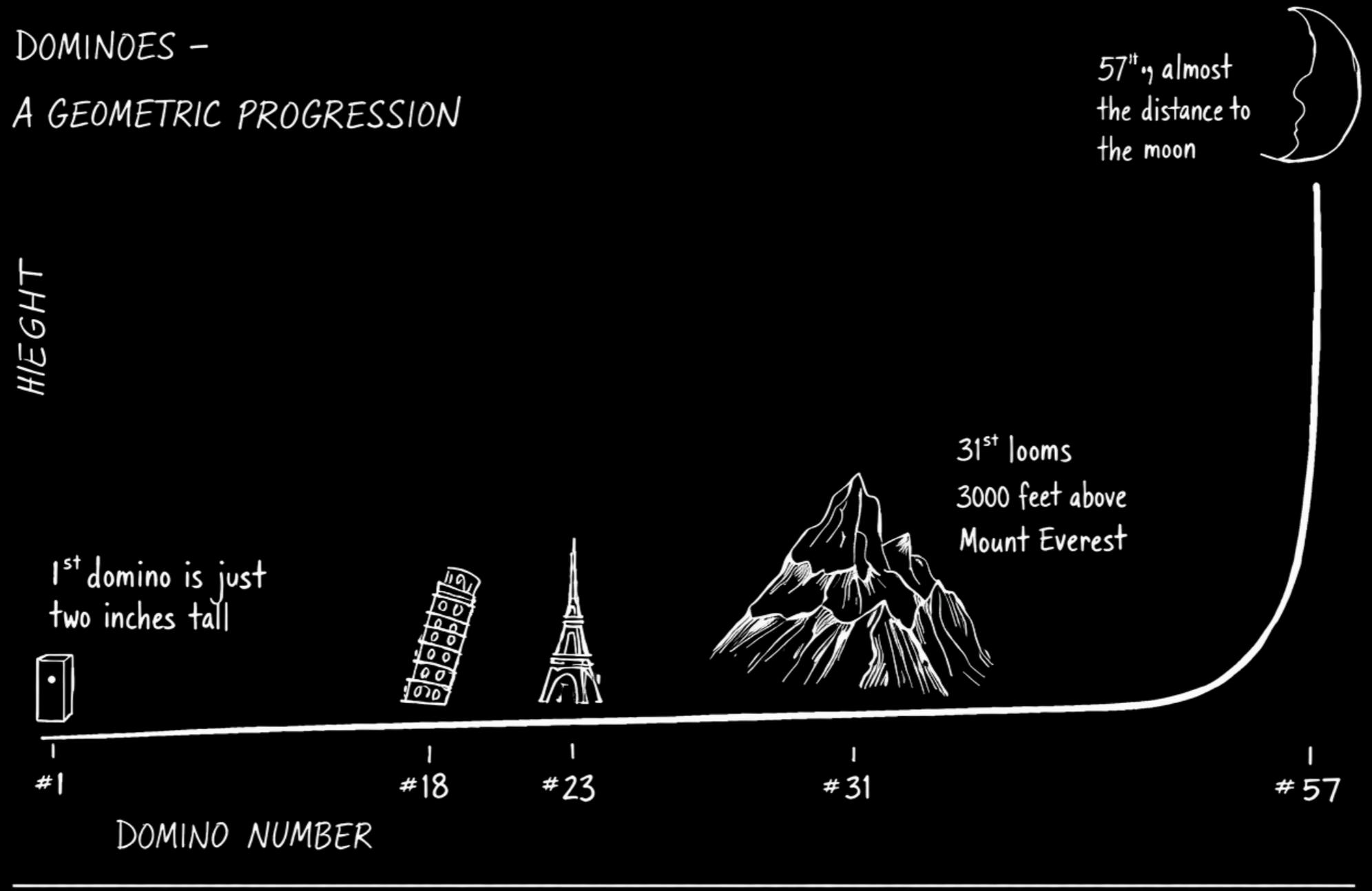
Revenue Growth vs Inflation (annualised)

	Adviser Revenue	60/40	RPI
10 year (2015 - 2024)	6.3%	8.4%	4.3%
First 5 yr (2015 -2019)	8.4%	10.2%	2.4%
Last 5 yrs (2020 - 2024)	4.9%	6.7%	6.3%

Source: Timeline, using FCA RMAR Data (2014 - 2024)

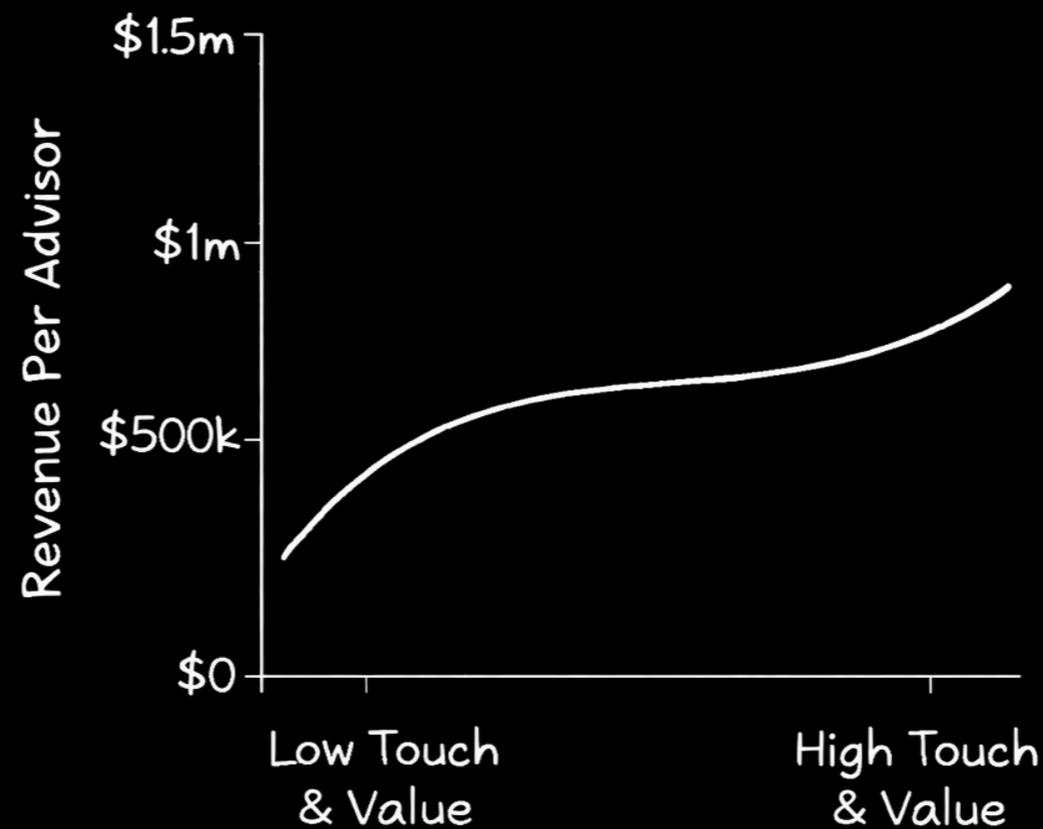


DOMINOES - A GEOMETRIC PROGRESSION



Level 1: Client Affluence + Pricing Confidence

Touch And Value



Source: Author, based on data Kitce (2024) Financial Planner Productivity Study

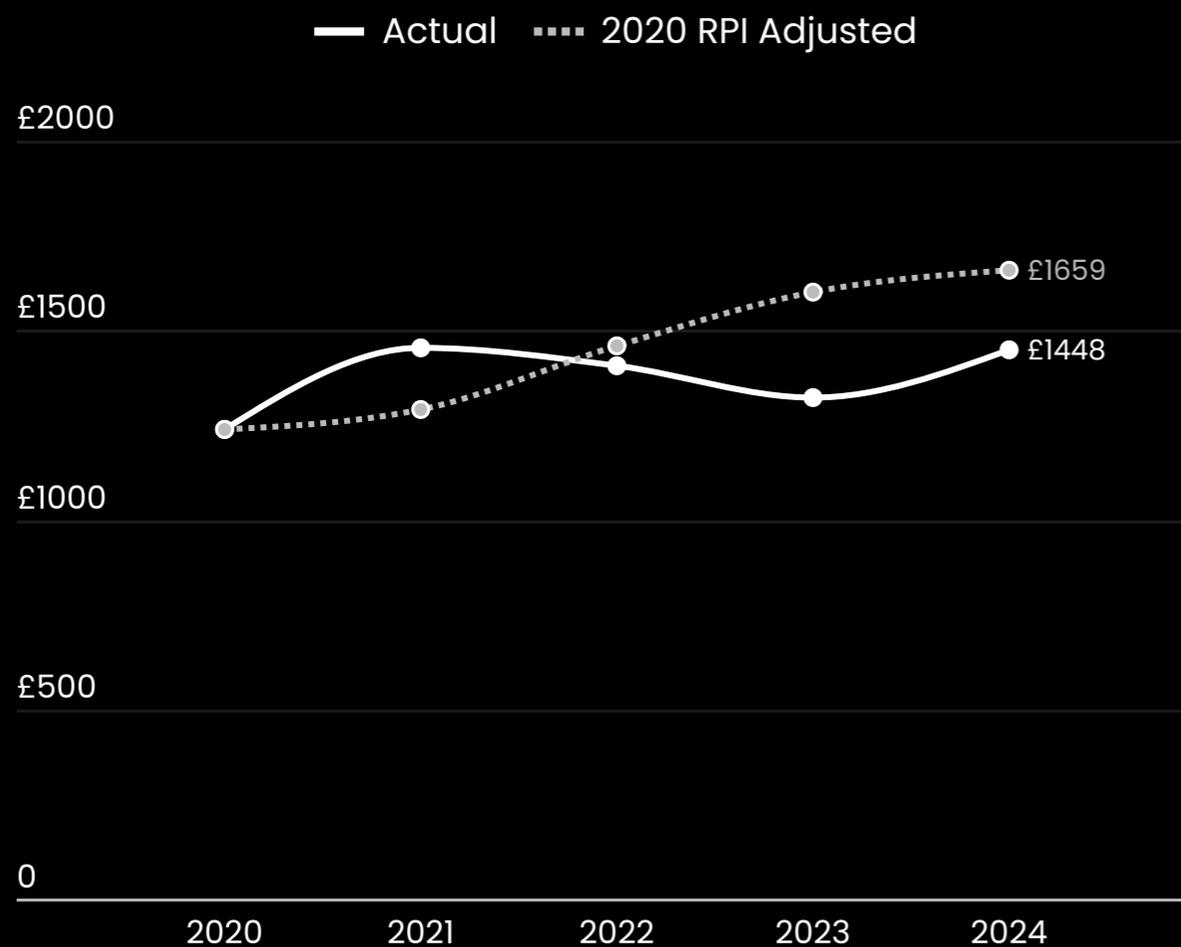
Total Team Time Per Client By Revenue Per Client



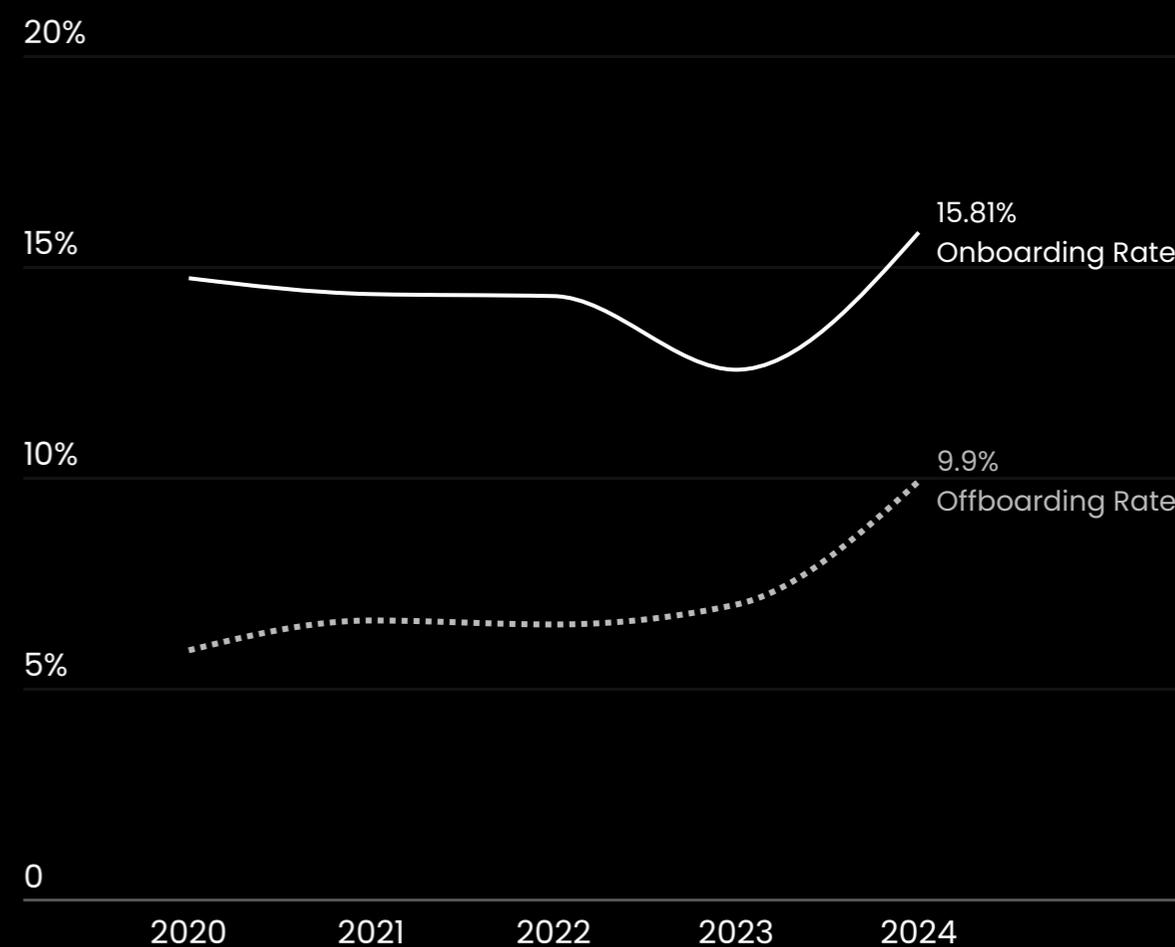
- Fee Discipline
- Enforce minimums
 - Avoid 'overservicing!'

Source: Author, based on data Kitce (2024) Financial Planner Productivity Study

Av. Revenue per client

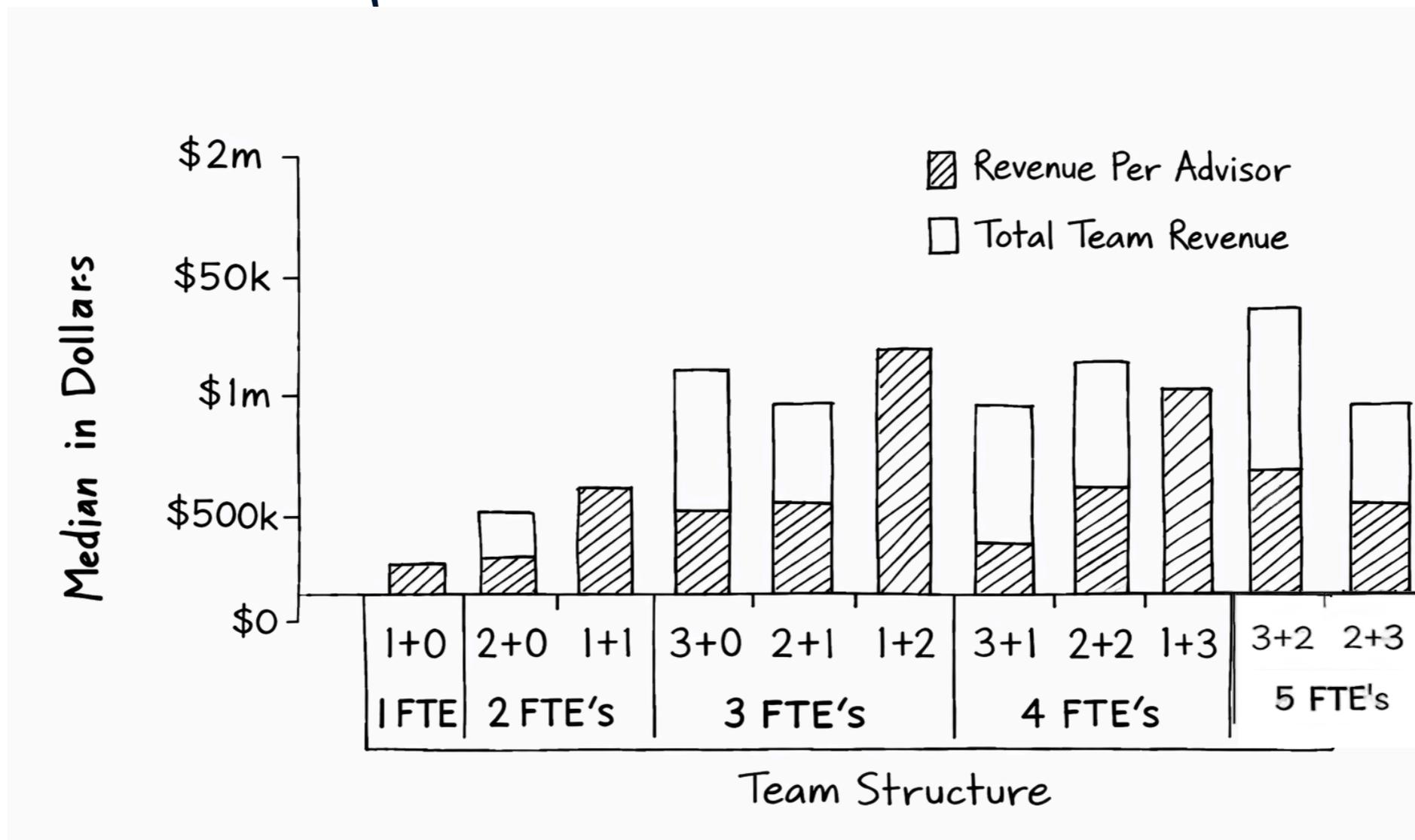


onboarding v offboarding Rate (%)



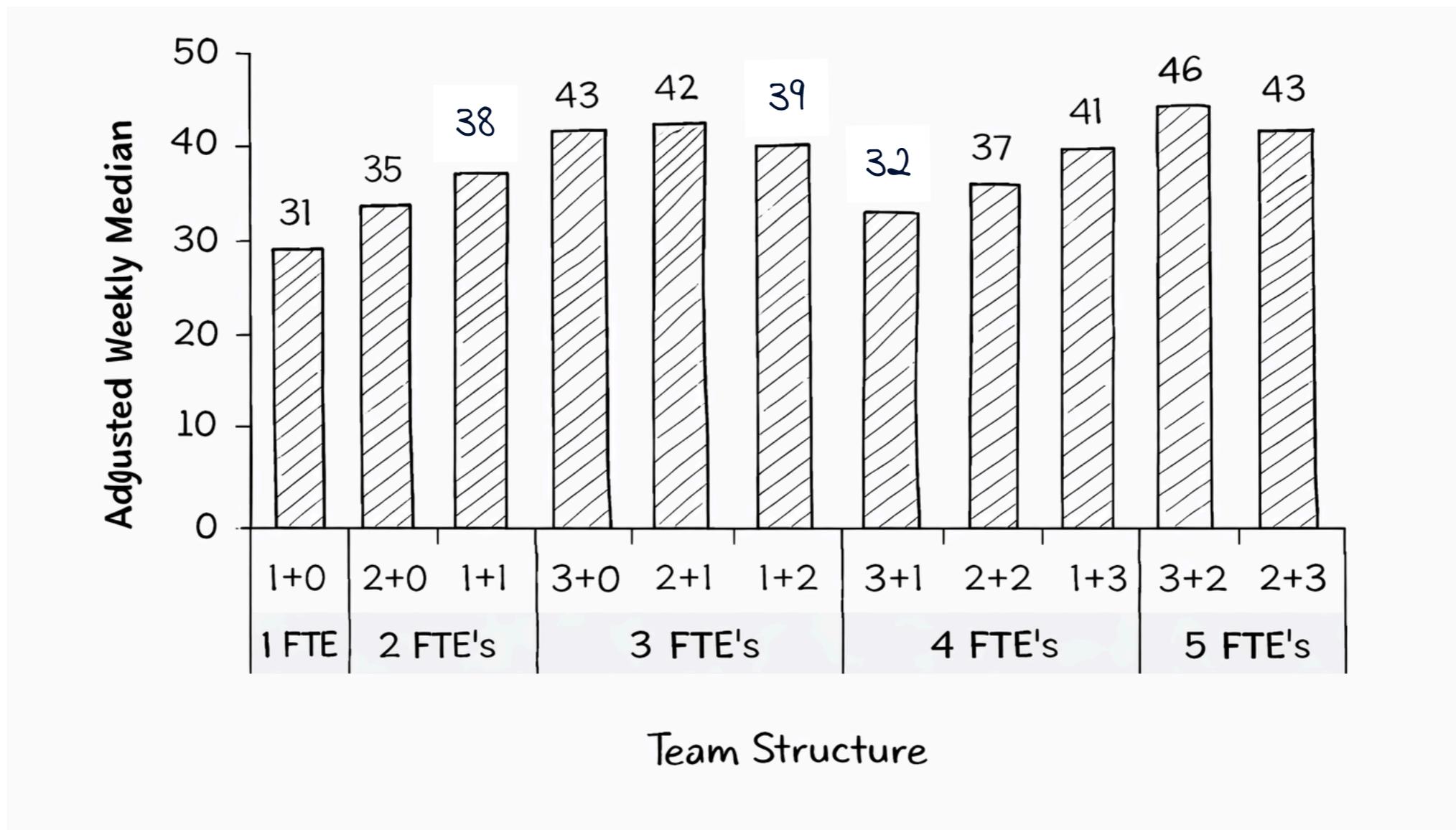
Level 2: Team Structure

That Optimises Face Time with Clients



Source: Author, based on data Kitce (2024) Financial Planner Productivity Study

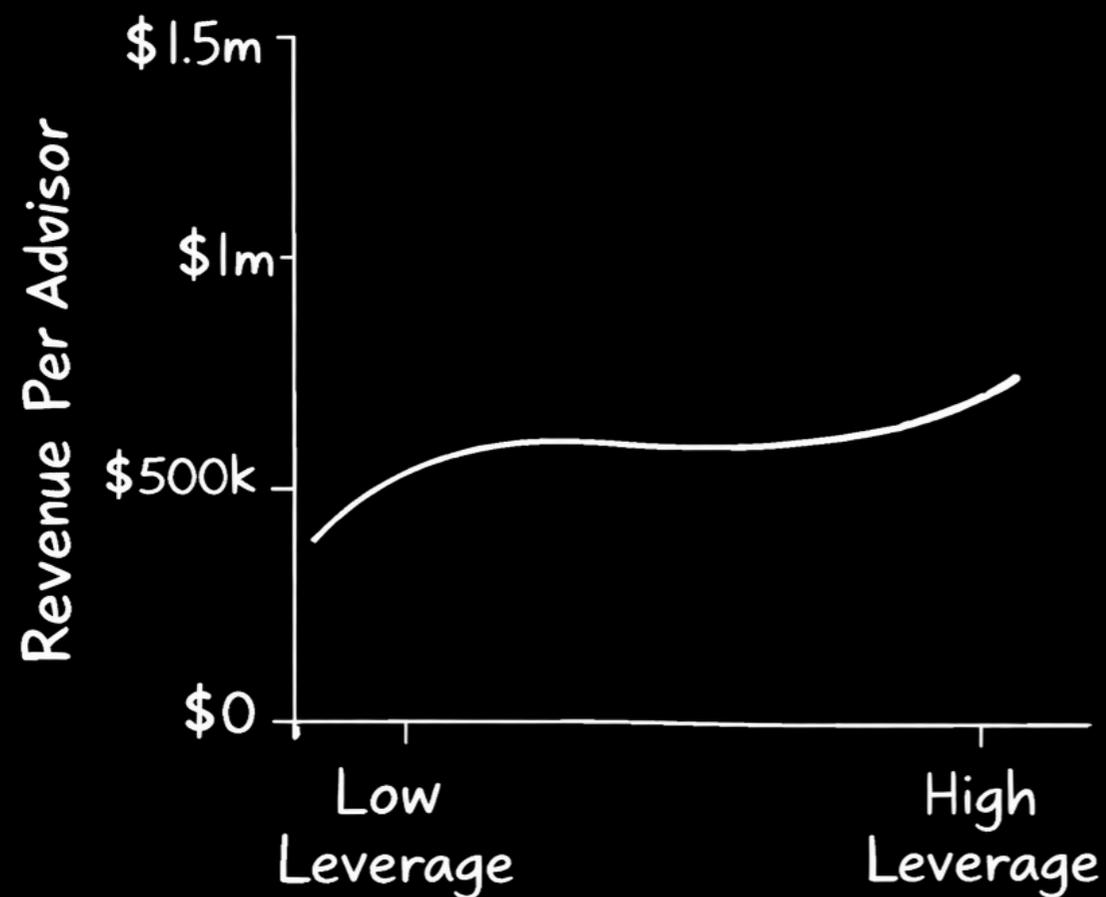
Lead Adviser weekly Hours worked



Source: Author, based on data Kitce (2024) Financial Planner Productivity Study

Level 3: Simplify Processes + Tech

Tech Leverage



This is a people business.
Tech is a leverage... but it
won't fix your people
problems!

Play your own game!

Thank You