



5 Ways to Scale Your Financial Advisory Business

Higher Asset Level Clients

Due to the inevitable upper limit in the # of hours in your day, you'll have to raise your client minimum asset size to scale with work/life balance.

Get the Best Advice Possible

After a certain level in your practice, you'll inevitably hit the ceiling on business strategy and growth ideas. Hiring objective and qualified outside advisors helps you scale faster and more profitably in the long run.

Train Your Staff @ Sophisticated Levels

Training your staff in higher order communication and productivity skills, leverages your team's talents and creates scale.

Buy a "Good Fit" Practice

Buying another practice has its pros and cons, but if you have a good demographic and partner fit, it's a fast way to scale.

Create Duplicatable Processes

The better (and simpler) your business and time management processes, the faster you will be able to scale.



By Antoinette Rodriguez, MBA

Feel free to use and distribute with attribution

©2019 MarFi Advisors, Inc.

www.marfiadvisors.com