

Services and Value Matrix



Purpose: To ensure your prospects understand the full extent of what you provide as an advisor.
Use this tool to show, contrast and compare your complete line of services and value you deliver.

Use with: Prospective clients

Instructions:

1. Create your own Service and Value Matrix by using the examples provided on the last page of this tool. Input the services and value-adds that embody your value proposition and that you are comfortable positioning with prospects. Once complete, you're ready to start using your matrix with all your prospective clients.
2. When meeting with a prospective client, present a blank version of the Service & Value Matrix—Current Advisor/Bank and ask them to share what services and value they are currently receiving. You may assist and provide the prospect examples for each category.
3. Present your own matrix to the prospect. Review the prospect's completed matrix and compare it against your own.
4. Position your service offerings and value to help you set and manage their expectations. During this time, you may also discuss the statements and reports that you provide to show your commitment to being transparent.
5. Move forward with your meeting by addressing any questions or concerns the prospect may have.
6. Store both copies in the client folder and make notes of your conversation in your client management system.

Services and Value Matrix – Current Advisor/Bank

Services and Value Matrix

Services and Value Matrix — Examples

Financial Management	Portfolio Management	Risk Management	Tax Planning	Legacy Planning	Client Experience
Mortgage & debt analysis	Portfolio/Pension analysis	Income protection	Tax analysis	Estate planning analysis	Thorough understanding of your values & beliefs
Cash flow analysis	Diversified product offering	Life Insurance	Tax return preparation and coordination	Will planning	Comprehensive risk profile
Cash flow projection	Retirement, education, emergency and savings Plans	Critical Illness	In-depth personal tax planning	Power of attorney planning	Action plans
RRSP/Leverage loans	Repositioning & rebalancing	Disability protection	Business tax planning	Charitable giving	Regular status reports
Determine financial goals	Maximized risk adjusted returns	Long-term care insurance	Tax-minimization Strategies	Business succession planning	Customized communication
Debt reduction strategy	Choice of money managers	Asset allocation to reduce risk	Corporate class strategy	Wealth transfer planning	Proactive problem resolution
Living expenses planning	Performance analysis	Monitoring of money managers	Income splitting	Probate planning	Referrals to other professionals
Progress statements and reports	MER & costs analysis	Business interruption insurance	Trust planning	Access to legal network	Other non-financial advice