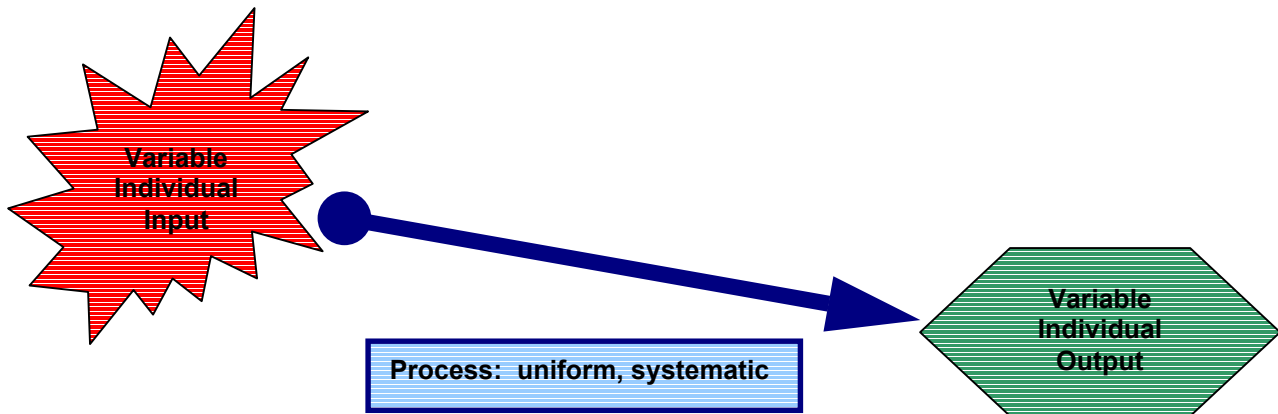




Process



Each person who goes through your advisory process is unique and comes to you with an individual set of circumstances.

That individual expects personally tailored advice as the result—not boilerplate.

Your efficiencies are mostly in the process stage. You can systematize, streamline, use software and delegate to staff at a lower echelon than you to crunch numbers and format your recommendations with splashy word-processing

Process makes opportunity visible.

On the front end, your skills at factfinding...and on the back end, your skills at presenting ideas and advising your clients on their unique options become paramount.

This perspective on process is the basis for many highly successful team efforts. The advisor relates with the client. The inside staff—with whom the client may not interact—does the exacting task of data entry, manipulating *what if* scenarios and formatting attractive output. Different skills sets; different interests.

Many young people today are interested in computers, software and numbers.

It is not necessary to hire a possibly disgruntled failing advisor to staff the process.

An enthusiastic young person looking for a chance to excel may be just the ticket and cost much less to employ in the inside staff position.