






Simple, clear plans for financial advisors...

The One Page Business Plan[®]

Write a clear, concise business plan with key words and short phrases using the sample business plan below as a guide. Your completed One Page Business Plan[®] should successfully answer the questions to the right of the sample below.

Allen Johnson, Financial Advisor Family Wealth Counselors, Inc. FY2010		
 vision	<p>Within the next three years (YE 2013) grow Allen Johnson, Financial Advisor at Family Wealth Counselors to \$75,000,000 in Assets Under Management, with revenues of \$700,000 by providing consultative financial services in the greater San Diego area to truly compatible clients consisting of busy professionals, active retirees, non-profit organizations and small to medium businesses.</p>	Vision What are you building?
 mission	<p>Take complexity out of family wealth.</p>	Mission Why does this business exist?
 objectives	<ul style="list-style-type: none">• Increase 2010 gross revenue from \$207,000 to \$315,000.• Grow AUM from \$32.7 million to \$45 million.• Boost my ROA from .59 to .70 BPS.• Eliminate all \$0-\$35k households clients by 6/30.• Expand +\$100k households clients from 51 to 80.	Objectives What will you measure?
 strategies	<ul style="list-style-type: none">• Focus on small business retirement, non-profit endowment & high net worth markets.• Attract/solicit high net worth thru golf club, non-profit and close personal network.• Minimize account transfer threats by improved customer service & relationship mgmt.• Utilize sales and marketing asst. to boost business; increase face time, improve image.• Pattern business after successful Financial Advisors thru study/observation/interaction.• Attract new clients thru mail and calling campaigns and persistent follow-up.	Strategies What will make this business successful over time?
 action plans	<ul style="list-style-type: none">• Complete training and implementation of SMART! database for myself and CSA by EOY.• Launch 2 aggressive campaigns per quarter to clients and prospects alike.• Close 6 small biz retirement plans at rate of 1 every other month; beg. 1/15• Hold 5 successful golf events for clients; May, June, July, Aug, Sept.• Complete 12 non-profit endowment presentations by 6/15. 12 more by 12/15.• Hold weekly Rookie FA business planning meetings for this branch; beg 5/1.	Action Plans What is the work to be done?