



AKADVISORY PARTNERS LLC
Unlocking Real Value

Your **REBOUND PLAN** for Future Growth

Over the past nine months, many members of the financial services community – both individual advisors as well as corporate entities – have focused their attention on adapting to the new economic realities; and this is understandable. For many this has meant doing more with less – fewer resources, fewer employees, etc. Even for those that avoided cutbacks – changes to customer behavior have affected distribution strategies and other aspects of their businesses.

While no one is quite sure when the recession will be over, and even though the market rally of the past three months has increased many people's optimism, uncertainty will remain for the foreseeable future. Future consolidation in certain segments of the industry is inevitable.

But now that you have made the necessary changes and adaptations, what do you do? Our answer is that now is the perfect time to be proactive in demonstrating to your clients and the market that you are focused on the future, prepared for the future and that you are going to be one of the survivors. Proactive action now will separate the winners from the rest of the pack.

Formalize your commitment to the future through a Rebound Plan. This Plan will be your marketing tool of the future that will separate you from the competition. In addition, it will serve the dual purpose of motivating your internal staff as they will be given the opportunity to buy into your vision of the future and become part of the Plan.

We at AK Advisory Partners LLC stand ready to help you develop your Rebound Plan. Our proprietary questionnaire and data-gathering process will help you more clearly see and then define your path to the future. We will help you decide the best way to present this vision – to both internal and external constituents – and then how to market it to increase revenues and referrals.

Please contact Andy Klausner (andy@akadvisorypartners.com / (617) 990-6894) to get started on differentiating you and your firm in the marketplace.

Potential Components of Your *Rebound Plan* *

I. External Rebound Plan – Clients and Prospects

- a. Mission Statement / Value Proposition
- b. General Firm Update
 - i. Appropriate Performance Metrics
 - ii. Client Communication Strategy
- c. Review of Response to Economic Crisis
 - i. Detail of Changes
 - ii. Permanency of Changes
- d. Review of Short-Term Corporate Strategy (through '09)
 - i. Resource Allocation Shifts
 - ii. Distribution/Marketing Plan
- e. Review of Long-Term Corporate Strategy (post '09)
 - i. Resource Allocation Shifts
 - ii. Distribution/Marketing Plan
- f. Servicing Template
 - i. Restatement of Commitment
 - ii. Review of Components

II. Internal Rebound Plan – Internal Employees

- a. Definition of Corporate Culture / Values
- b. Mission Statement / Value Proposition
- c. General Firm Update
 - i. Appropriate Performance Metrics
 - ii. Client Communication Strategy
- d. Review of Response to Economic Crisis
 - i. Detail of Changes
 - ii. Permanency of Changes
- e. Review of Short-Term Corporate Strategy (through '09)
 - i. Resource Allocation Shifts
 - ii. Distribution/Marketing Plan
- f. Review of Long-Term Corporate Strategy (post '09)
 - i. Resource Allocation Shifts
 - ii. Distribution/Marketing Plan
- g. Internal Training Game Plan
 - i. Interactive
 - ii. Cross-training
- h. Introduction or Restatement of Client Referral Program
 - i. Inclusive of all Employees
 - ii. Incentive Based

* Rebound Plans are customized for each client and may contain some or all of the above components. In addition, depending on your particular needs, end audience and preferred delivery methods, additions may be recommended for inclusion.