



ASSETMARK
GOLDFORUM

GOBEYOND





WELCOME TO BRADY'S

Unreasonable Hospitality for Financial Advisors

TRICIA BRADY | VP, BUSINESS CONSULTING
ASSETMARK

SUPPORTING YOUR FIRM'S VISION OF SUCCESS

MARKETING YOUR BUSINESS

- Value Proposition
- Target Client Profile
- Marketing Plan
- Referral Management
- Center of Influence Process

BUSINESS STRATEGY & PLANNING

- Segmentation
- Client Services Checklist
- Sample Service Model
- Client Opportunity Review
- Technology Self Assessment
- Technology & Outsourcing Resources



CLIENT EXPERIENCE & OPERATIONS

- Business Assessment Tool
- Economic Modeling
- Creating a Powerful Strategic Plan
- Value Maximization Plan
- Goal Planning
- Monitoring & Tracking Progress

EMPOWERING YOUR TEAM

- Business Assessment Tool
- Economic Modeling
- Creating a Powerful Strategic Plan
- Value Maximization Plan
- Goal Planning
- Monitoring & Tracking Progress

WELCOME TO BRADY'S



MISE EN PLACE: SETTING THE TABLE

Why Unreasonable Hospitality is the New Competitive Edge



ENTREE: THE MAIN EXPERIENCE

Delivering Hospitality with Intention & Precision



ACCOMPANIMENTS: CURATED PAIRINGS

Tools, Templates & Real Advisor Success Stories



DESSERT: THE FINALE

Your Next Steps to Elevate the Client Experience



MISE EN PLACE: SETTING THE TABLE

Why Unreasonable Hospitality is
the New Competitive Edge

IN A WORLD OF
AUTOMATION,

Empathy is
your edge.

88%

report that *experience matters
as much as service (PwC)*

- Guests (clients) rarely leave because of performance- **they leave because they feel unimportant**
- We're not just competing with other advisors- **we're competing with Amazon, Uber, and Starbucks**



IT'S NOT ABOUT THE MONEY.

*It's about the
meaning.*



KEY CONCEPTS:

- Coined by **Will Guidara** of **Eleven Madison Park**
- Go beyond expectations to **surprise and delight**
- Make people feel **seen, valued, and known**
- **Care > Cost: It's about emotional generosity**
- **Small gestures > big price tags**

HOW IT TRANSLATES to FINANCIAL SERVICES?

KEY CONCEPTS:

- Think Like a hospitality Professional
- Show up intentionally & Personally in every client interaction
- Move from transactions to transformations



REAL STORIES,
REAL IMPACT.

*Moments that
made clients
feel seen.*



*Clients won't remember
the performance report – but
they'll never forget how you
made them feel.*

-Inspired by Maya Angelou

REAL ADVISOR MOMENTS:

Advisor 1: Personalized Welcome Kit=Increased Referrals

Advisor 2: Anniversary Gifting = Re-engaged inactive client

Advisor 3: Handwritten Thank-Yous = Client's adult children
joining firm



ENTREE: THE MAIN EXPERIENCE

Delivering Hospitality with
Intention and Precision

FROM VENDOR TO VALUED - PARTNER.

*The mindset shift
that changes
everything.*



OLD MINDSET:

- I provide advice, performance, and planning
 - Defined by tasks, transactions, and to-do list
-

NEW MINDSET:

- Every client is a VIP
- Ask: What's one thing I can do today to make them feel special?
- Build culture around care

SHIFT THE QUESTION:

What do I have to deliver? *to*

How do I want this client to feel?

100 TOUCHPOINTS THAT BUILD LOYALTY.

*Make every
moment count.*



EVERY MOMENT IS A CHANCE
TO CONNECT:

100 TOUCHPOINTS CHECKLIST PURPOSE:

- Elevate routine interactions
- Add emotional context to each stage of the journey
- Create a repeatable rhythm of care

TOUCHPOINT CATEGORIES:

- Prospecting & first impressions
- Discovery & onboarding
- Annual reviews & ongoing care
- Milestones & life events
- Gifting, surprising, & delighting
- Advocacy & loyalty moments

MAPPING THE CLIENT JOURNEY.

*From first contact
to lifelong loyalty.*



CLIENT EXPERIENCE JOURNEY:

1. **PROSPECT** > You matter- even before you're a client
2. **DISCOVERY** > We see the person, not just the plan
3. **ONBOARDING** > We thought of everything so you don't have to
4. **ESTABLISHING THE RELATIONSHIP** > We remember what matters to you
5. **ANNUAL REVIEWS** > We walk with you – not just plan for you
6. **MILESTONES & LIFE EVENTS** > We celebrate- and grieve – right alongside you
7. **ADVOCACY & LOYALTY** > We're your team – and your network's



ACCOMPANIMENTS: CURATED PAIRINGS

Tools, Templates and Real Advisor
Success Stories.

TOOLS FOR PERSONALIZATION, GIFTING AND DELIGHT.

*Turn insight
into action.*



THREE CORE TOOLS TO OPERATIONALIZE HOSPITALITY:

- Personalization
- Gifting
- Surprise & Delight

AMPLIFY HOSPITALITY with AUTOMATION

Let tech handle the remembering, so you can focus on the connecting.



- **CRM TAGS FOR CLIENT INSIGHTS:** Track favorite coffee, alma mater, bucket list items. Use these in meeting prep.
- **AUTOMATE REMINDERS:** Set calendar alerts for life milestones (anniversaries, retirement dates, pet birthdays)
- **EMAIL SEQUENCING:** Send welcome emails or personalized check-ins triggered after onboarding
- **GIFTING TOOLS:** Use Postal.io, Snappy, or Handwrytten to send timely, personalized gifts without manual step
- **TOUCHPOINT DASHBOARDS:** Set up a client journey tracker in your CRM to ensure each client gets white-glove care



DESSERT: THE FINALE

Your Next Steps to Elevate the
Client Experience

BUILDING YOUR 90-DAY ACTION PLAN.

1 CHOOSE ONE FOCUS AREA:

- Onboarding
- Personalization
- Gifting
- Family Connections
- Review Process
- Surprise & Delight

2 SET TWO COMMITMENTS:

- What will you implement in the next 30 days?
- What habit will you build long-term?



GROUP REFLECTION & STORY SHARE.

*Small moments
big impact.*



REFLECTION PROMPTS:

- What's one moment when you made a client feel seen?
- What's one new idea you're excited to try?
- What's your biggest 'aha' from today's session?

RESOURCES TO KEEP THE MOMENTUM GOING.



- Client Experience Tool Kit
- Worksheets & Playbook Materials
- Advisor Implementation Guides
- Slides & Workshop Replay (if available)
- Access Workbook with QR Code on the right





LEARN HOW ASSETMARK CAN HELP TAKE
YOUR PRACTICE TO THE NEXT LEVEL.

Call one of our Consultants:
(800) 664-5345

Or to see replays or register for
upcoming webinars, visit:
assetmark.com/events

Important Information

AssetMark, Inc. is an investment management and consulting firm that helps independent financial advisors build great businesses. This is for informational purposes only, is not a solicitation, and should not be considered investment, legal, or tax advice. The information has been drawn from sources believed to be reliable, but its accuracy is not guaranteed and is subject to change.

References to financial advisors and service providers are intended for informational purposes only and should not be considered an endorsement or recommendation of AssetMark. Each party is responsible for their own content and services. AssetMark and its affiliates may engage with providers for services.

Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results.

AssetMark, Inc. is an investment adviser registered with the U.S. Securities and Exchange Commission.

©2026 AssetMark, Inc. All rights reserved.

8749004.1 | 02/2026 | EXP 02/29/2028

For financial advisor use only.