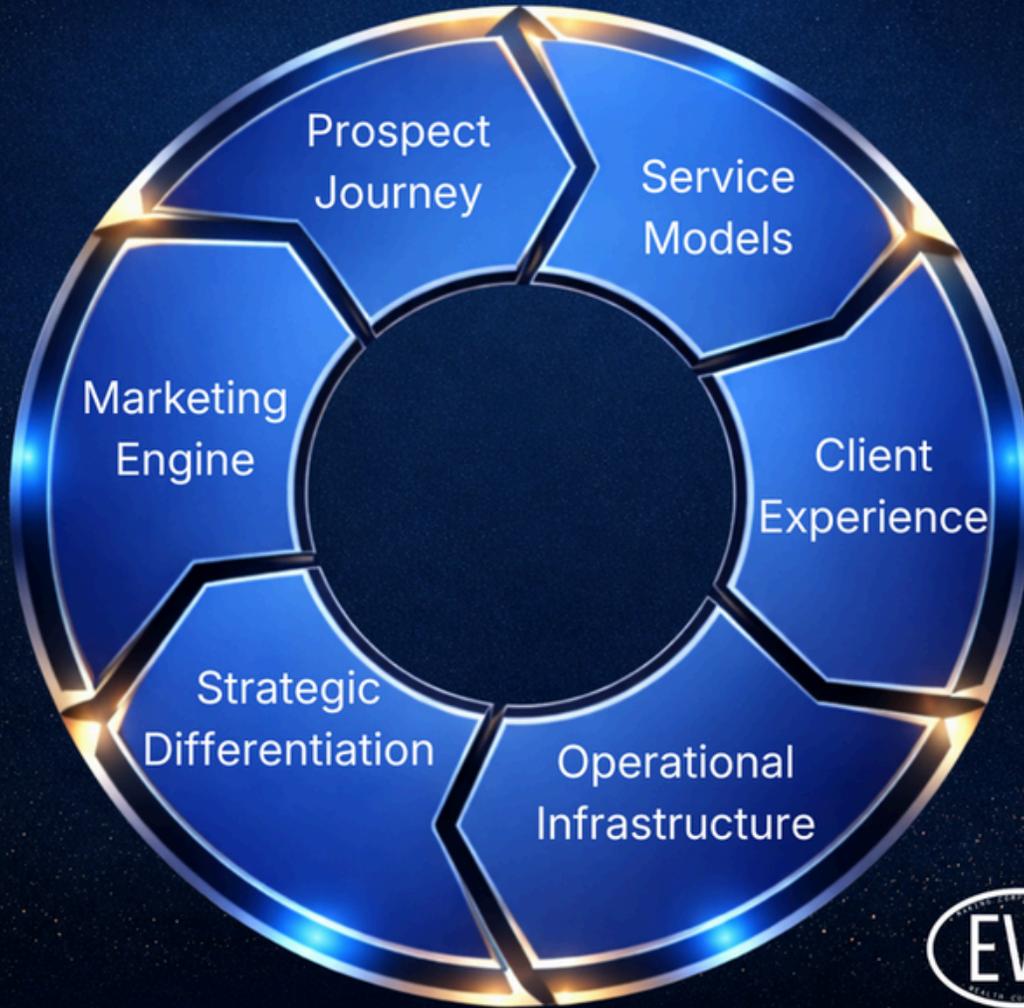


RIA Growth Flywheel

Engineered Systems. Visible Value. Compounding Growth.



Compounding Growth Starts with the Operating System

Evaluate Before Taking Action

*For Growth-Focused
RIA Leadership*

Mike Casciano
Founder | EVO Wealth Consulting

Current Approach vs Flywheel

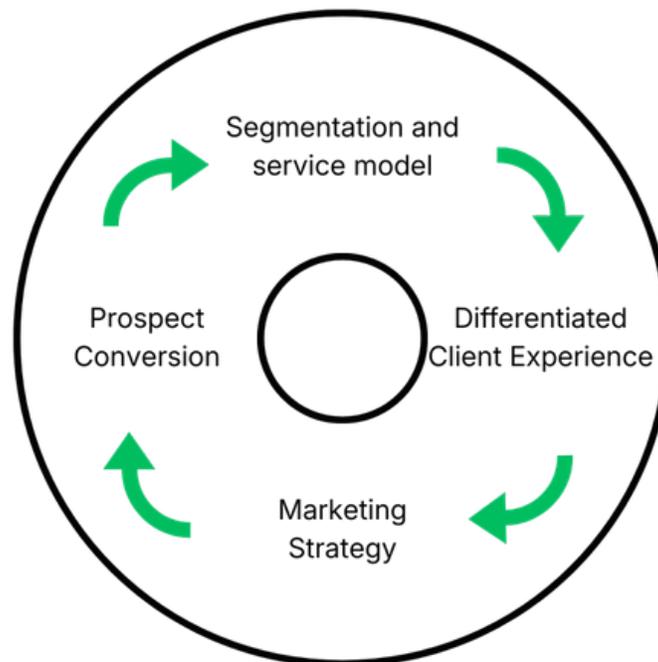
Most RIAs improve one function at a time.

- Marketing strategies get funded
- Technology gets replaced, AI is bolted on
- Services, resources, and people are added

But episodic improvements rarely create durable momentum.

A growth flywheel is different.

It is an integrated operating system where each component is engineered to continuously strengthen the next.



The challenge is that the flywheel needs to be completed before it can be set in motion.

The result is not just growth, it is scalable infrastructure that creates durable capacity and margins.

6 Components of the RIA Growth Flywheel

Marketing Engine

Builds a predictable pipeline of high-value, right-fit prospects by leveraging strategic differentiation and brand authority.

Prospect Journey

Converts high-quality prospects into committed clients through a structured, efficient, and value-driven decision process.

Service Models

Architects economically disciplined, segmented service models that align client value, pricing integrity, and scalable capacity.

Client Experience

Makes value visible through structured clarity and explicit alignment between financial planning, investment strategy, and long-term goals.

Operational Infrastructure

Aligns technology, data, and operational workflows to eliminate friction, protect margin, and enable scalable differentiation.

Strategic Differentiation

Defines and operationalizes a differentiated value prop that attracts right-fit clients and fuels long-term competitive advantage.

Flywheel Evaluation

Marketing Engine

Does it:

- Attract right-fit prospects
- Reduce reliance on referrals
- Amplify the firm's brand
- Improve prospect quality
- Build authority in a niche
- Create predictable pipeline velocity

Prospect Journey

Does it:

- Demonstrate differentiators
- Quantify value
- Provide clarity
- Align planning and investments
- Eliminate objections
- Communicate the value proposition

Service Models

Does it define:

- Who gets what
- How often
- At what depth
- At what price
- With what margin
- With what capacity impact

Client Experience

Does it:

- Make value visible
- Simplify complexity
- Measure progress
- Reinforce differentiation
- Build emotional trust
- Promote referrals

Operational Infrastructure

Does it:

- Increase margins
- Reduce manual workflows
- Improve data integrity
- Unlock capacity for growth
- Embed compliance oversight
- Deliver quantifiable differentiation

Strategic Differentiation

Does it:

- Define value proposition
- Provide clarity and context
- Shape messaging
- Protect pricing power
- Create right-fit demand
- Influence entire flywheel

The RIA Flywheel Engagement

A structured two-day session designed to evaluate the current operating system, define goals, and create a roadmap for process, messaging, and infrastructure enhancement. This is the foundation to create a custom growth flywheel for wealth management firms.

Day 1: Discovery (3 hours)

We examine your segmentation, service model, prospect journey, messaging, technology stack, and operational workflows to identify constraints and inconsistencies, and determine goals and objectives.

Day 2: Assessment & Strategic Roadmap Delivery (3-4 hours)

You receive:

- A Flywheel Alignment Score
- Differentiation and Visibility Assessment
- Messaging and positioning enhancements
- Process and infrastructure improvement priorities
- Margin and capacity unlock opportunities
- A prioritized, ROI-driven implementation roadmap

The result:

Clarity. Alignment. Action

Delivered in days... not months.

Deliverables and Engagement

The Outcome: Clear path to action and adoption

After two focused sessions, firms leave with:



Clear Client Segmentation

Defined tiers aligned to revenue, complexity, and service intensity.



Documented Service Model

What is core. What is custom. What differentiates. What scales.



Defined Brand Messaging and Value Prop Narrative

Quantifiable differentiators driven by your service model and segments.



Growth, Capacity, & Margin Alignment

Visibility into improving advisor and firm efficiency.



Custom Activation Roadmap

Prioritized by ROI, implementation cost, and immediacy of results.

Get Started: Pilot Opportunity

EVO just launched a pilot opportunity to refine and scale the RIA Growth Flywheel framework with a select group of firms committed to durable, system-driven growth.

We are allocating ten individual engagements for firms or advisors to participate. The full two-day engagement is being offered at the pilot rate of \$2,000.

The objective is simple. Deliver measurable clarity, a prioritized roadmap, and actionable improvements in days... not months.

EVO's structured operating system evaluation has been designed from hundreds of advisor consultations.

This engagement is best suited for established advisors or firms that are experiencing capacity constraints, pursuing higher growth, and are seeking to implement AI strategically, not reactively.

If your firm is serious about driving growth through process and infrastructure — not episodic change — this is the starting point.

Schedule an introduction here:

<https://calendly.com/mike-evo/30min>



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