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|  | **How to Use Your 2023 Investment Services Business Plan** |
| SPENCER CONSULTING TEAM |

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| --- | --- |
| Clipboard with solid fill | This is not meant to replace a more thorough plan that is activity and revenue driven. |
|  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| Target Audience with solid fill | This is intended to market your business inside the financial institution, build relationships, garner commitments and gain trust. |
|  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| Upward trend with solid fill | Set appointments with stakeholders and COIsto review quarterly or as needed. This consistency builds trust and credibility. |
|  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **Icon  Description automatically generated** | For institutions that emphasize revenue, feel free to add revenue targets. Be careful to convey that gross revenue is not your income as that may be poorly received. |
|  **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **A picture containing text, sign, yellow, painting  Description automatically generated** | This is available in Word format so that it may be altered, shortened, or lengthened. Modify it to best fit your needs. |
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|  | **2023 Investment Services** **Business Plan** |
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**Mission Statement**

|  |  |
| --- | --- |
| Unique differentiator:  |  |
| Key service/deliverables: |  |

 **Marketing Strategies:**

|  |  |
| --- | --- |
| Targeted activities:  |  |
| Key centers of influence: |  |
| Other marketing strategies: |  |

 **Goals:**

|  |  |
| --- | --- |
| Number of New Clients: |  |
| Number of New Financial Planning Clients: |  |
| Number of Clients to Transition to Retirement: |  |
| Revenue to Bank: |  |

 **Keys to success:**

|  |  |
| --- | --- |
| Branch: |  |
| Key Contribution to Branch: |  |
| Key Contribution to Investment Services: |  |
| Outcome: |  |

 **…**

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| Branch: |  |
| Key Contribution to Branch: |  |
| Key Contribution to Investment Services: |  |
| Outcome: |  |

 **…**

|  |  |
| --- | --- |
| Branch: |  |
| Key Contribution to Branch: |  |
| Key Contribution to Investment Services: |  |
| Outcome: |  |

**Personal Development Goals**

|  |  |
| --- | --- |
| **1.**  |  |
| **2.**  |  |
| **3.**  |  |

**SWOT Analysis**

 **Strengths**

 **Weaknesses**

 **Opportunity**

 **Threats**