



Tel 206.826.4382
answers@fainsight.com
PO Box 1955
Tacoma, WA 98401

FOR IMMEDIATE RELEASE

FA Insight Launches Advisory Firm Study Dedicated to Business Growth

Tacoma, WA (March 22, 2010) – Now is the time for advisors to get back on the growth track! Today, research and consulting firm FA Insight announces the launch of its second annual comprehensive benchmarking study that will soon deliver much needed support. Fielding is now underway for *The 2010 FA Insight Study of Advisory Firms: Growth by Design*, an advisor-centric research effort that promises to be the industry’s leading resource for driving accelerated business growth.

“Battling back from a severe economic downturn, firms are starting to experience some upward movement in assets and revenue. This does not equate to *sustainable* growth, however,” said Dan Inveen, FA Insight Principal and the Director of Research. “This year our study will address the new priority need for many advisors—driving growth. *Growth by Design* focuses on two distinct business capabilities that will create long-term ongoing firm growth—marketing and operations—and the coordination between these capabilities that must occur in order for any firm to accelerate its growth.”

Study results, due in July this year, will provide critical data and decisive insight for firms striving to achieve new client acquisition without sacrificing operational excellence. The study’s operational component will focus on driving productivity and profitability and will include analysis of process and procedure management, service turnaround times, accountability for operations, utilizing productivity metrics as well as technology usage and training. Marketing coverage will include examination of marketing strategy, budgeting, growth goals, client segmentation, channels of new client acquisition, marketing accountability, pricing, retention and the client value proposition.

The FA Insight team has led several of the industry’s most notable research initiatives in recent years, building a reputation for producing actionable insight that stems from a combination of extensive in-the-trenches management consulting capabilities and industry-leading research experience. *Growth by Design* follows *The 2009 FA Insight Study of Advisory Firms: People and Pay*, recognized as the industry’s most comprehensive human capital study.

Eliza De Pardo, FA Insight Principal and Director of Consulting, shared, “*Growth by Design* will encourage advisors to extend their thinking beyond the traditional means of achieving business growth. Many firms have under-invested in marketing, taken a passive approach to new client acquisition, and failed to

recognize the benefits of a more comprehensive and aggressive marketing strategy. Others have taken their eyes off the many operational levers that can have a dramatic impact on productivity and profitability. In *Growth by Design* we will combine the specific learnings from the industry's Standout Firms with our best practice guidance to support shareholders in accelerating their growth."

Each participating advisory firm will receive a complimentary study report (50+ pages) and an invitation to attend a Webinar to review study results with the FA Insight team. Given advisors' hunger for independently produced and empirically based business management information, the FA Insight team expects strong participation from across the industry. Advisors have until April 19th to submit survey data for their firms. To participate, just visit www.fainsight.com and go to the "Research Studies" page. The *Growth by Design* study is supported by Investment Advisor, the exclusive media partner of FA Insight.

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About FA Insight

Headquartered in Tacoma, Washington, FA Insight is an independent industry research and management consulting firm that exclusively serves the financial services industry.

For more information, contact Dan Inveen or Eliza De Pardo at 206-826-4382 or by e-mail at dan@fainsight.com and eliza@fainsight.com.