



**SYMMETRY ADVISOR STRATEGIES**

Creating Your  
Unique Positioning Statement

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Advisor Name: \_\_\_\_\_

Date: \_\_\_\_\_

## Creating Your Ideal Client Profile

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Creating a positioning statement that truly defines you, your business, and your role as an advisor is an invaluable investment in yourself and your business.

**By committing yourself to the process of developing a unique positioning statement, or UPS, you can help:**

- Communicate your unique offering(s)
- Find the target audience(s) that will be most receptive to your message
- Expand your brand
- Earn more qualified referrals, and
- Engage more effectively with centers of influence

While developing an impactful positioning statement takes dedication, time, effort and introspection, it doesn't have to be burdensome.

***Let's get started!***

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**Many advisors have an “elevator pitch” or “mission statement” which generally includes the typical who, what and how as it relates to their businesses.**

While informational, these statements can have a negative effect on your business as it activates a sales alert with prospects which can put them on defense from the outset. In developing your Unique Positioning Statement, it is crucial to remember that people don't buy what you do, they buy *WHY* you do it.

Below are some key considerations that should remain top of mind when crafting your unique positioning statement.

**1. Give a brief description of your background.**

**2. What caused you to decide to become a financial advisor? Was there a specific experience that influenced this decision?**

3. Create one sentence describing why you believe in what you do.



4. What beliefs or unique qualities do you have that set you apart from other advisors in your space?





## Who Are Your Best Clients?

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Undoubtedly, you have worked with many different types of investors with different needs, goals and objectives. Describe your three most meaningful clients. What is special, unique or different about these relationships? Why do they resonate with you? Summarize in 2-3 sentences.

## Assessing Your Competitors

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Your practice should not exist in a vacuum. You should be aware of the services that other advisors are providing in your marketplace so that you can effectively differentiate your value and the services that you provide.

### 1. Who are the competitors in your space?

### 2. What services and solutions do they offer?

### 3. What makes your services and solutions better choices than the alternatives? Think about what is unique about your process and solutions. What has the greatest impact on your clients?

## You're Almost Done

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Now that you have articulated why you do what you do, what you offer, and who you do it for, you are ready to craft your Unique Positioning Statement.

Remember, a unique positioning statement is a powerful marketing tool. It should be an accurate, succinct, high level overview of who you are and the values you offer as a financial advisor.

**Give it a try:**





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additional information.



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