

**Let's look for few characteristics in our clients :**

**1. "Respect" for our expertise**

This should probably be the **first & foremost characteristic** we should look for in our client.

If he doesn't respect our expertise, he will keep running to bankers, PMS sellers, direct equity or even direct AMCs.

Only when he respects the fact that we are experts who can help him, he will stick around with us.

**2. Values our "time"**

Many a time this situation arises wherein the client calls for a meeting & then makes us wait for long, claiming that "**busy in some important work**" or sometimes there's a "**No Show**".

Let's understand the value of our own time.

If we have a list of 100 clients, out of which 5 act in this manner, we have every right to put them in the watch list & give second preference than to those who value our time.

**3. Is "Fairly" or "Very Busy"**

Let's also understand that a client who is **super-free is equally undesirable**.

If he does not have anything productive or interesting to do, he will continue checking his portfolio & keep bugging us for every fall.

He will also expect a daily market commentary from our team. This is neither going to create wealth for the client & at the same time eat up a lot of our time.

Instead, we prefer clients who are "**fairly**" or "**Very Busy**" and are happy with an annual review meet (or at the most bi-annual meet).

**Few Tools** Which help our Clients Work at their convenience :

**Financial Health Check**

**Online Tracker**

**Mobile APP**

Are very handy to manage the finances in their busy schedule .

#### **4. Who Believes in “Win-Win”:**

It's not difficult to find clients who **want enormous wealth for themselves but don't want anyone else to make money.**

Such clients will keep bugging for passbacks, freebies etc.

Instead, Lets understand its important for us to have a sustainable income so that the clients can be serviced.

Those who agree with this idea, are the right-fits for onboarding. Those who resist may be put on a waitlist.

#### **5. Has reasonable “expectations”:**

We definitely make an attempt to set the expectations right on the start of our journey.

Clients having unreasonable expectations

**(be it returns, service, knowledge or meeting at odd days / hours)** are not likely to stick around for long.

The list can go on, but we will just cut it short here.

All of the above criteria might not be applicable for all clients.

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