



**WHAT'S  
NEXT**  
a BPAS service



## Financial Advisor Best Practices

What's Next, a BPAS service, brings professional coaching and consulting services to financial advisors looking to build a more efficient, more profitable business. As veteran financial advisors and practice development experts, we've walked in your shoes. With more than 75 years of experience and success, we help clients learn how to take their businesses to the next level.

### Client-Centric Planning

- Holistic wealth management: taxes, estate, insurance, debt.
- Behavioral finance: manage biases, guide decisions.
- Values-based planning: align with family and life goals.

### Transparency & Trust

- Clear fee structures: flat or transparent AUM models.
- Full disclosure: risks, conflicts, costs explained.
- Education first: act as coach and teacher.

### Tech-Enabled Service

- Hybrid advice models: human + robo-advisors.
- Data-driven insights: real-time tracking of goals.
- Cybersecurity: MFA, encryption, proactive monitoring.

### Personalized Communication

- Multi-channel contact: video, mobile apps, secure messaging.
- Proactive outreach during volatility.
- Generational sensitivity: Boomers vs. Millennials/Gen Z.

### Business Sustainability

- Succession planning for continuity.
- Niche expertise creates differentiation.
- Team-based models outperform solo practices.

### Role Clarity, Capacity & Delegation

- Clearly define advisor vs. support staff roles.
- Avoid overcapacity: balance client load with service quality.
- Delegate routine tasks to free advisors for high-value work.

### Time & Calendar Management

- Prioritize client-facing activities during peak hours.
- Use scheduling tools to optimize availability.
- Block strategic planning time to avoid constant reactivity.

### Proactive Growth

- Regularly seek referrals and strategic partnerships.
- Stay current on industry trends and client needs.
- Invest in professional development and certifications.

*"The What's Next team has been instrumental in creating the organizational foundation that's allowed me to grow my practice to levels I never thought possible."*

*—Advisor Client in California*

Ready to take your business up a notch?

**Let's Talk.**

**BPAS**

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