**Client Classification Worksheet**

Click in the grey sections to enter information or print and complete manually.

**Step 1: Define Your Ideal Client**

The ideal attributes you outline below will be used to define the types of new clients you want to attract to your practice going forward.

**Assets** (used to denote profitability via Assets or Revenue)

Define your Client Equation by Assets:

1. Desired Assets under Management:
2. # of Clients:
3. Assets per Client (A/B):

OR Define your Client Equation by Revenue:

1. Desired Revenue:
2. # of Clients:
3. Revenue per Client (A/B):

How will you manage the money (i.e. fee-based, customized portfolio, etc.)?

**Attitude**

Be specific: List specific attributes you expect

**Advocacy**

Be realistic: How many referrals would you expect per year from each AAA client?

**Step 2: Your Knock Out Factors**

The knock-out factors you outline below will be used to assess new clients coming into your practice.

**Assets**

Less than $

**Attitude** (Be specific)

**Step 3: Client Classification**

The client differentiation you outline below will be used to sort and organize your existing clients as well as, accurately classify new clients coming into your practice.

**AAA** (Assets/Attitude/Advocacy)

* Meets your **A**sset in terms of how you’ve defined your Ideal Client Profile $
* Demonstrates Ideal Client **A**ttitude attributes
* Meets your **A**dvocacy requirements

**AA** (Asset/Attitude)

* Meets your **A**sset in terms of how you’ve defined your Ideal Client Profile $
* Demonstrates Ideal Client **A**ttitude attributes

**A** (Assets)

* Meets your **A**sset in terms of how you’ve defined your Ideal Client Profile $

**AF**

* These are family members of a client in one of the ‘A’ groups.
* This classification can also be used for friends, family or relatives for the advisor.

**B**

* This client has a great attitude, is committed to working with the advisor and may even provide introductions but does not have Ideal Client assets/revenue.
* AUM or Revenue Range of $

**C**

* This client does not have the assets to be in the B group and is not someone you will be growing your business with in the future.
* This client may eventually be reassigned as assets in the **AA** and **AAA** groups increase.
* AUM or Revenue Range of $

**D**

* This client is generally not a fit for the advisor and should be reassigned.
* Less than $      in AUM or Revenue