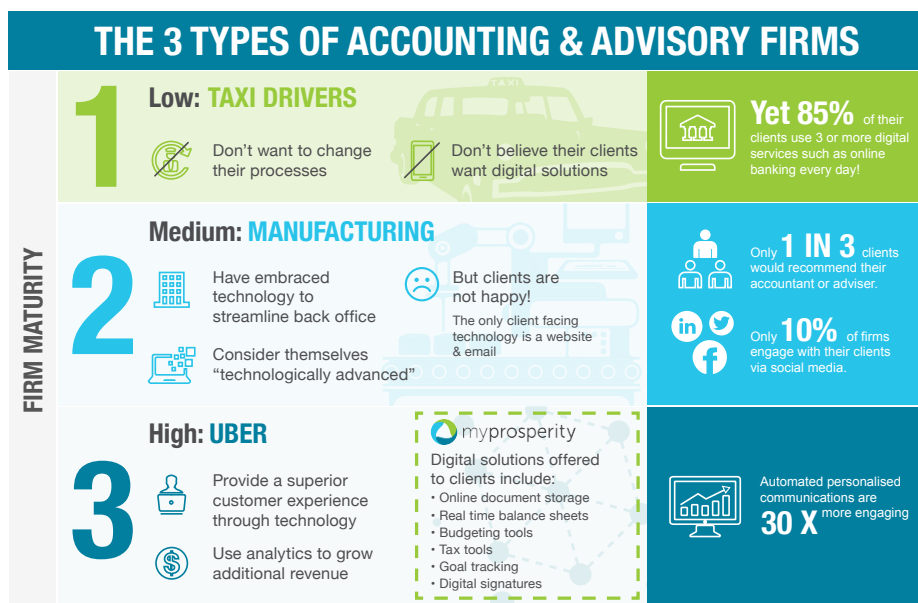


In this report: Key findings from ATSA 2016

ATSA SPECIAL REPORT

The 3 types of advisory firms

In his session, our CIO [Stephen Jackel](#) identified three types of advisory firms.



Type 1 – Taxi Drivers

Like things the way they are and don't want to change. Don't believe that they need to change the way they've been doing things for years.

Type 2 – Manufacturing

Leveraging technology for efficiency, often to the point of obsession. Streamline back office process wherever possible. Focus mostly inside their four walls on production rather than on client experience.

Type 3 – Uber

Improving client experience through technology prompting them to consider a product

Share "3 types of advisory firms" with your network!



Twitter

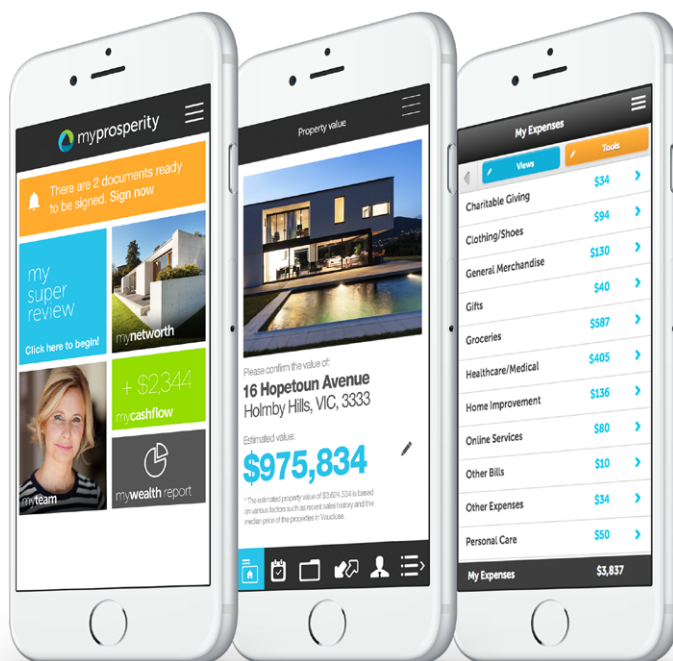


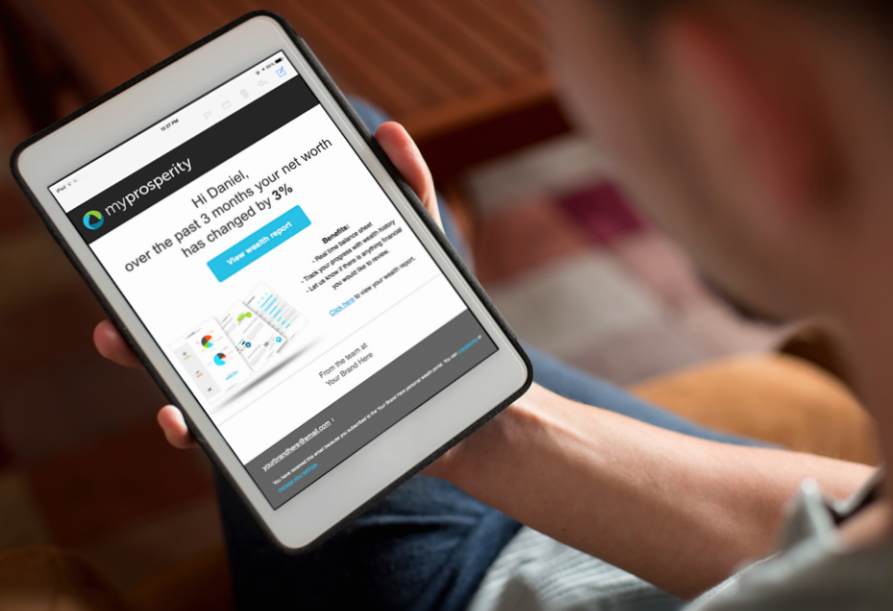
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More firms are embracing technology

We were genuinely blown away by the amount of financial advisory firms who are fast realising the potential of **internal revenue growth** through the implementation of technology services, which enables them to:

- **increase lead generation**
- **increase client retention**
- **increase workflow efficiencies**





Recognition of client engagement growth

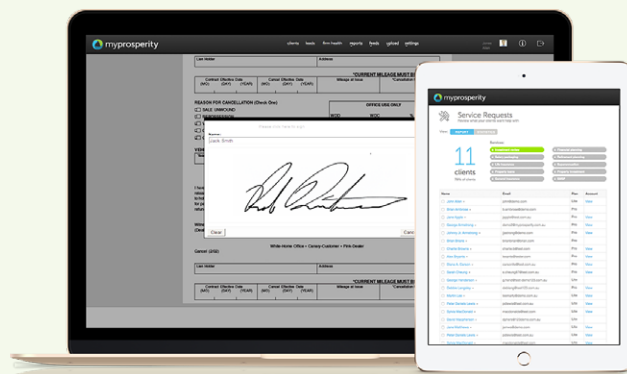
We can all agree that the experience of the client is becoming increasingly essential to financial services. Advisers are becoming more aware of the importance of client engagement which in turn leads to **client retention** and **word of mouth referrals**.

70% of buying experiences are based on how the customer feels they are being treated (McKinsey)



myprosperity ATSA 2016 prize winner

Congratulations to Andrew Harper of Casey Partners on winning our draw for an Apple watch! Being awarded his prize by [Matt Green](#). Life is [#betterwithtech](#)



What's next?

Get started with myprosperity, it only takes a minute to request a demo and we'll be in touch to help from there.

[Request a demo](#)

Breakfast sessions

Join us at one of our upcoming breakfast presentations on disruptive financial service and the myprosperity platform. Express your interest now!

[Express interest](#)

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