ARC ECHO - FREE ADVISER WORKSHEET

Financial Adviser Ideal Client and Priority Audience Worksheet

Use six practical decisions to define who should recognise themselves in the next campaign - without turning the choice into a blanket client-acceptance rule.

KEEP THE BOUNDARY CLEAR

Marketing priority is not client eligibility. This worksheet helps choose whose situations should shape a campaign. It does not decide who the firm may advise or imply that other suitable clients are unwelcome.

Page 1 - Six inputs

1. Recognisable situation

Describe the people through a real planning situation, not wealth or age alone.

___

___

2. Trigger

Name the event or approaching change making the decision timely.

___

___

3. Decision

State the consequential decision they are trying to make.

___

___

4. Uncertainty

Capture the friction, assumption or unanswered question delaying action.

___

___

5. Credible expertise and service fit

Use expertise the firm can evidence without making unsupported specialist claims.

___

___

6. Desired next step or conversation

Choose the responsible next step or conversation the content should encourage.

___

___

ARC ECHO - FREE ADVISER WORKSHEET

Turn the inputs into one working statement

Use this structure as a starting point, then edit it into the firm's natural language.

Our marketing priority is **[situation]**, prompted by **[trigger]**. We will help them think through **[decision]**, address **[uncertainty]**, demonstrate our relevant experience in **[expertise]**, and encourage **[next step]**.

Your edited statement

____

____

____

____

Five-question specificity test

[ ] Could the intended reader recognise the situation without relying on wealth alone?

[ ] Is there a timely trigger or approaching decision?

[ ] Is the uncertainty specific enough to shape useful content?

[ ] Can the firm demonstrate relevant expertise without unsupported claims?

[ ] Does the statement encourage a responsible next step or conversation?

Fictional UK advice-firm example

Harbour Oak Financial Planning
Our marketing priority is business owners preparing to step back from their company, prompted by a likely sale or management handover within three years. We will help them think through how the exit connects with their personal financial plan, address uncertainty about whether the proceeds will support the life they expect, demonstrate our relevant experience in joined-up cashflow, retirement and business-exit planning, and encourage a first planning conversation about exit assumptions and personal priorities.

Next step: use the free Content Blueprint to turn the working audience hypothesis into a firm-specific 90-day direction.
arcecho.co.uk/content-blueprint