Practice Client Map

Advisor Name	John Doe
Advisor Address	
Advisor Phone	

Please list your clients in the client map below.

Client First Name	Client Last Name	Client's Relationship Expectations	Clients Investment Return Expectations	Client's Risk Tolerance	Client's Planning Goals	Client's Most Valued Relationship Quality	Assets Under Management	Current Annual Recurring Revenue	Potential Annual Recurring Revenue	Referral Pattern	Most Significant Marketing Opportunity
Client	A	Client A expects me to contact him if something goes wrong.	Client A expects to double his investment in 10 years.	Low	Child's College Fund	Client A likes to hear about the bottom line.	$ 50,000.00	$ 500.00	$ 750.00	Low	Church
Client	B	Client B wants me to coach him in all of his investment choices.	Client B wants to add another $100,000 before retirement.	Medium	Retirement	Client B really values one on one time.	$ 500,000.00	$ 6,000.00	$ 7,500.00	Medium	Business Networking
Client	C		Client C wants to grow his investment 8% per year.	Low	Estate	Client C likes frequent communication.	$ 5,000,000.00	$ 4,000.00	$ 75,000.00	High	Customers
									$ -		
									$ -		
									$ -	