

TOTAL ALIGNMENT DELIVERS RESULTS FOR MUTUAL FUND FIRM

This Fund Group Wasn't Looking for Help, but Knew a Good Thing When they Saw It

One president of an international investment advisory firm that focuses on profitable niche markets around the world wasn't looking for help. Her company was doing quite well as a mutual fund firm that specialized in emerging markets and natural resources. But a chance encounter at an industry function with Maximum Impact Partners' Ami Tully Lotka changed all that. "I think what impressed me the most about Ami was the fact that she and the Maximum Impact Partner team had 'been there, done that' and even though our meeting was brief and her presentation short, I got the impression she clearly knew her stuff."

All fast-growing companies have issues and this one was no different. Although effective and experienced in other markets, this company's recent move into the RIA (Registered Investment Advisor) market wasn't moving as fast as they had hoped and it was becoming clear that their RIA strategy was pretty much "MIA." The company just didn't have the expertise in house to get the job done. Then this company leader remembered meeting Ami.

"We visited by phone and I hired Maximum Impact Partners on the spot because, once again, their professionalism, knowledge and practical advice came shining through. Hiring them to help us develop the RIA channel was a natural."

During the next several months, Maximum Impact Partners worked closely with the company's leadership team to review their current approach to this market. From that, they showed what they were doing right and what needed course correction. Of course Maximum Impact Partners developed a number of new selling essentials, too. Among the most impactful was teaching the sales team how to forge and nurture relationships with advisors. Another came in the form of solid, organized, practical advice that everyone could act on immediately and see the results.

"Every meeting and training session exceeded our expectations delivering tactics we could put into action immediately. The best part, we all had faith in these ideas because they were coming from people with tons of experience. There was no guessing, no testing; the tactics were built on solid strategies that work. I would honestly say that Maximum Impact Partners has the best handle on the RIA marketplace, hands down. No other company could possibly come close."

It's easy to understand why this company feels that way. Their launch into the RIA market has been a success story in itself. They built their department, their program, and most of all, lasting relationships with an ever growing base of advisors. And the results happened quickly. "We have a steady inflow of advisors and they are very loyal to us."

The company has doubled its assets under management in the last year and the outlook for the future looks just as promising. "I really trust Maximum Impact Partners and truly value their opinion." It's easy to understand why.

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