

What sets your advisory practice apart?

A practical worksheet to define your value proposition

Sharpen your value proposition to stand out in a competitive market

Your value proposition isn’t just what you say; it’s how clients understand the value of working with you.

Whether you’re building toward breakout growth or refining your approach for a specific target segment, this template can serve as a structured exercise to sharpen your message.

The goal is simple: translate what you do into language that resonates and makes your value both visible and uncopiable.

The four pillars of a resonant value proposition

Use this worksheet to help you sharpen your message based on four pillars that shape a strong, client-aligned value proposition. You’ll also find tips and examples throughout to help spark ideas and bring each pillar to life.

These pillars can help you define what sets your practice apart, align your message across your business, and communicate with greater clarity and confidence. For more insights into shaping your practice’s unique value proposition, see [Sharpening your value proposition](#).

Pillar	Focus	Guiding question
1. Your ideal client	Who you serve	Who do you serve best and why?
2. Your distinct approach	How you help	What makes your process or philosophy stand out?
3. Planning and portfolio integration	What you deliver	How does your guidance translate into progress?
4. Client experience	How it feels to work with you	What is it like to work with you?

Pillar 1: Your ideal client

Clarify your ideal client, beyond AUM or age. Think in terms of mindset, goals, and complexity. Which clients do you serve most effectively, and which ones would you like to attract more?

Example: *“We specialize in working with business-owning families managing generational transitions. We help them structure liquidity events, navigate succession planning, and align long-term financial goals across generations.”*

What client profile do you best serve today?

What type of clients are you looking to attract more of, and why are they a good fit for your next stage of growth?

Where have you helped a client make meaningful financial progress and what contributed to the strength and success of that relationship?

Pillar 2: Your distinct approach

What principles, beliefs, or process define how you deliver advice? Your approach is often what makes your practice different, especially when core services feel similar. Whether it's how you guide decision-making, personalize planning, or structure reviews, identify what's consistent in how you serve clients. While your core approach should feel consistent, you can tailor the way you express it to reflect the specific goals and concerns of your target segments, especially in client conversations or marketing.

Tip: Advisors often default to saying “comprehensive” or “customized.” Push beyond generic words to clearly articulate what you actually do differently, and why it matters to the client.

Examples: *“Our advice process is designed to help clients gain clarity and confidence. We use a defined framework to align financial decisions with life priorities, revisiting goals regularly to make sure the plan reflects what matters most—even as life changes.”*

“For the business owners we serve, our advice helps strike a balance between growing their business and building personal financial security. Many reinvest most of their capital back into the business. We help them carve out space to prioritize personal goals, too, like retirement income planning or managing concentration risk. Our process respects their entrepreneurial mindset while expanding their financial focus beyond the business.”

What's your core belief or philosophy about wealth management?

How does your process reflect that belief?

What do clients consistently say they value most about how you work?

Pillar 3: Planning and portfolio integration

Planning and investing should work together—but clients don't always see the connection. Your value proposition is stronger when you show how advice turns into action. Define how your planning strategy and investment management process work together to move clients toward their goals.

Tip: Avoid listing services. Instead, show how your advice turns into action and helps clients move forward with clarity and confidence. Whether you use model portfolios, custom strategies, or both, focus on how your approach reflects client priorities and adapts to where they are and where they want to go.

Examples: *“Our planning process helps define your priorities, from retirement income to legacy goals. We use a consistent, research-backed investment approach that’s designed to reflect those priorities and adjust as your needs evolve. The strategy is disciplined, but always tailored to where you are in life and where you want to go.”*

“We use model portfolios to bring institutional-quality investment management to our clients. What sets our approach apart is how we select and integrate those portfolios into your broader financial plan. It’s about keeping your investment strategy aligned with your goals and risk profile, even as life and markets evolve.”

How do your planning and investment services work together to support client goals?

What outcomes do you consistently help clients achieve?

What’s one part of your process that gives clients clarity or direction?

Pillar 4: Client experience

The experience of working with you is part of your value. Your value proposition isn't just about services and solutions; it's also about how it feels to be your client. This is where trust, consistency, and the personal side of your approach come through. Define what clients can expect from the experience you deliver and why it matters.

Tip: Make it personal and practical. You're building a relationship, not selling a transaction. Clients may not remember every market update, but they will remember how you made them feel: understood, reassured, and prepared. That's your advantage. Own it.

Example: *"We combine personal guidance with on-demand tools so clients feel empowered and supported—not left on their own. They know they can reach out anytime but also access resources and updates when and how it fits their life. It's this ongoing connection—not just quarterly meetings—that helps them stay engaged, confident, and make the most of their investment in the relationship."*

What do clients say they value most about your relationship? Think beyond performance. Consider communication, consistency, partnership, or how you help them stay on track.

How do you help clients feel informed and supported during uncertain times? Be specific: proactive outreach, education, scenario planning, check-ins, etc.

What makes your experience stand out from other firms or advisors? Is it how you tailor interactions? How you use tools or time? Your team's responsiveness or style?

Bring it all together

Your value proposition is more than a statement; it's how you consistently show up for your clients and communicate the difference you make. Use what you've captured in this worksheet to craft your unique value proposition, and then apply it to help refine your client conversations, strengthen team alignment, and guide future business decisions.

A strong value proposition reflects both who you are and what today's clients truly value. Revisit it regularly and test parts of it in real conversations. See what resonates. Sharpen where needed. The more you use it, the more powerful and authentic it becomes.

Sharpen your value proposition

Your value proposition is more than just a tagline—it's a statement of purpose, relevance, and promise. See why your value proposition is critical to conveying your value to clients.



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