

CASE STUDY

Client Discovery Leads to Growth



Challenge

A large bank broker-dealer was seeking to enhance partnerships among product specialists, bank relationship managers and advisors to drive internal referrals and cross-selling.



Solution

Pershing's Advisor Practice Management team tailored their *Advisor Value Propositions and Enhance Client Discovery* programs with an emphasis on a partner approach to clients and delivered these across all regions with the Regional Sales Managers.

ONE REGION REPORTED

16% INCREASE IN REFERRALS

25% INCREASE IN BANK CLIENTS TO INVESTMENT CLIENT

50% INCREASE IN AVERAGE AUM OF NEW INVESTMENT CLIENTS

This case study is not intended to guarantee or represent that all firms will achieve the same or similar results.

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