


Mid-year Metrics 2018

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Just a quick heads up to let you know that the **2018 Mid-Year Metrics Podcast** is now available via the OnDemand app and browser (via this [link](#)) – with a video podcast, an audio-only podcast, and a pdf of the slides.

Why guess when you can know what the market thinks? Mid-year metrics are about market feedback—what's working and emerging trends—and truly is information that other firms can only wish they had.

A few highlights:

- Fielding speaks to YTD progress toward our organic growth goal—only \$3 million to go!—and initiatives (PAS is killing it);
- Rush speaks about the sources of strong organic growth (\$1.2 million of new recurring revenue so far) in our wealth management business and shares a few best practices;
- Eric Bailey spotlights a few wins and shares eye-popping leading indicators for the E&F business (85 meetings so far in 2018); and
- Hudson digs into what's hot in the retirement plans business (Did I mention that PAS is killing it?).

- Our wealth advisors are tracking **\$6.4b** in outside assets from existing clients....**\$700m** of which is in cash!!!! Let's Bridge that first! Seems like we are standing on a whale fishing for minnows!
- This year we already have Six PAS engagements with revenue in excess of **\$100k**.....knowing that every PAS client should lead to wealth bridge opportunities....**56** bridge wins YTD.....Leverage, Leverage, Leverage!
- Two of our biggest wins are E&F clients!**The Flywheel is Spinning!**
- **John Curry** is as knowledgeable and experienced as any in the industry....He is second to None!....(That was not in the podcast, but I wanted to throw it in anyway 😊)
- We are The *Largest 338 advisor* in the country
- We are the *Largest Retirement focused RIA* in the country
- We are one of the *Largest Wealth RIAs* in the country
- If our DCP assets were a standalone business, it too would be one of the Largest RIAs in the country
- We are one the largest E&F firms in the country
- ***Experience Matters!!***

Bottom line: Our mojo is working across all business lines, so run through the tape into 2019.