

The Top Characteristics

1. They are in the **Relationship Business**.
2. They are driven by a **Selfless Purpose**.
3. They protect and monitor their **Image and Reputation**.
4. They have mastered the **Art of the Interview**.
5. The word “**no**” becomes a key business strategy.
6. They identify and proactively manage **Client Expectations**.
7. They have a well-defined **Wealth Management Process**.
8. They are obsessed with the **Exceptional Client Experience**.
9. They have strategically blended **High-touch with High-tech**.
10. They implement a structured **Planning Process**.
11. They build trust by displaying **Predictable Behavior**.
12. They continually **Learn and Improve**.