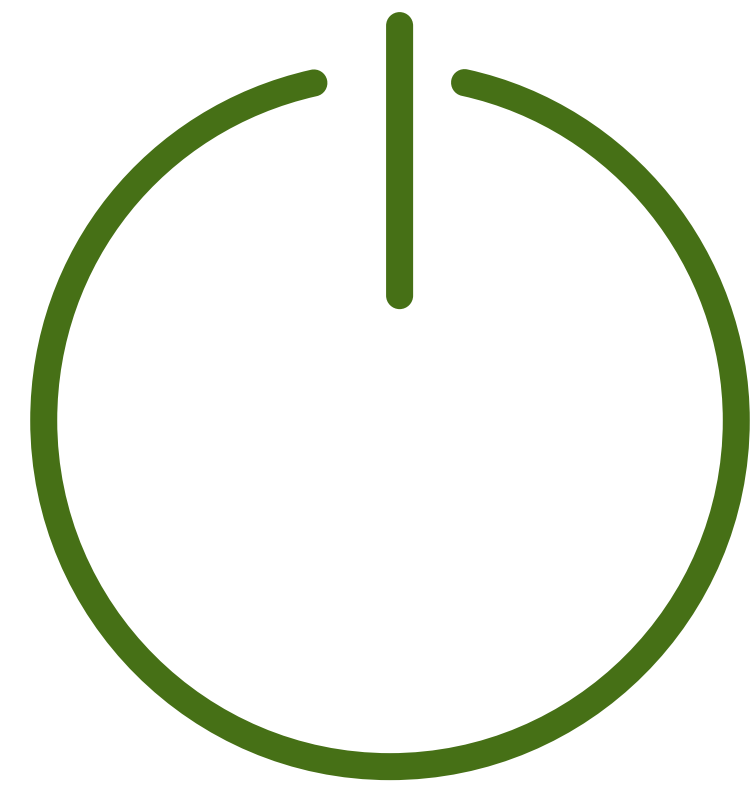


# Top Ten Behavioral Traits of the Relevant Advisor



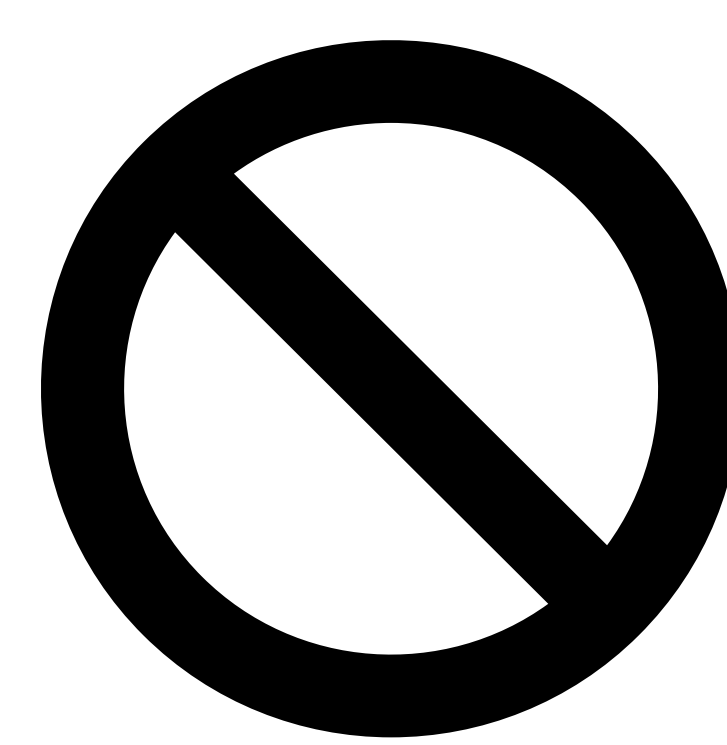
**10** They are empowered by technology

**9** They understand how to leverage transparency



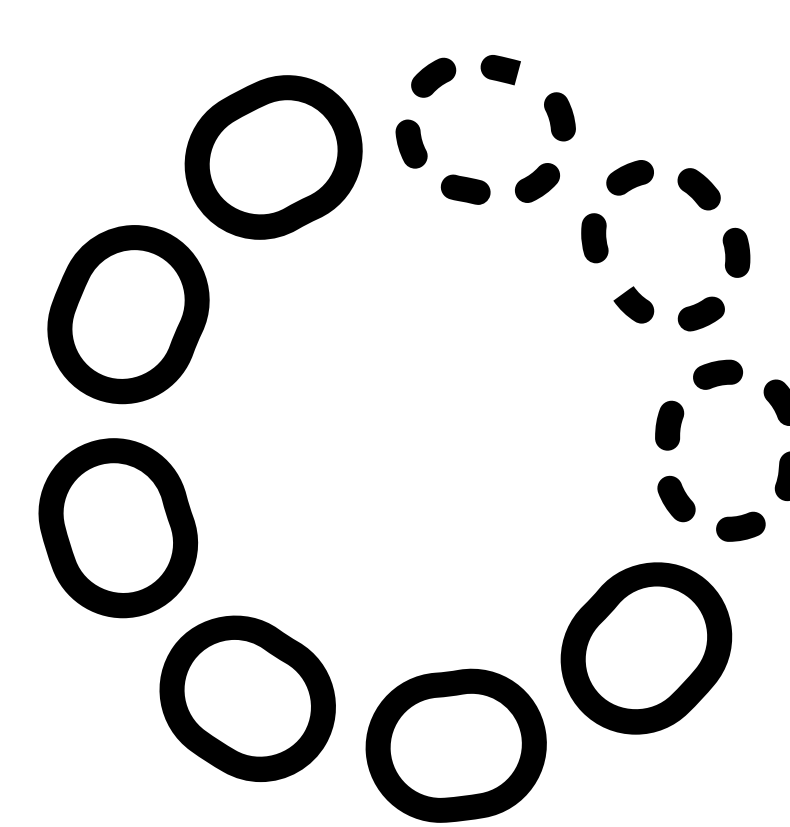
**8** They have a well crafted 24/7 client experience

**7** They use the word "no" as a key strategy



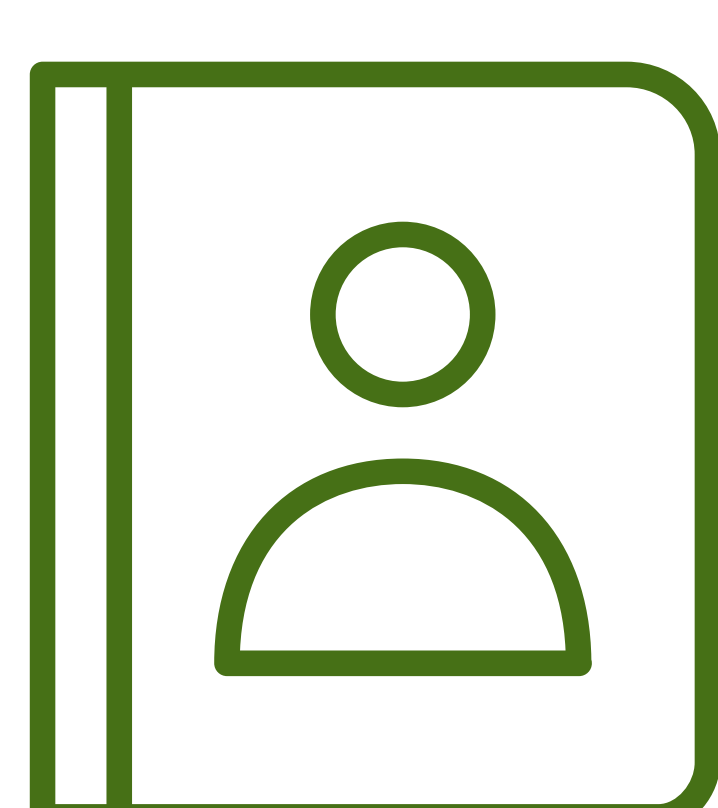
**6** They proactively manage client expectations

**5** They have a well defined wealth management process



**4** They collaborate daily with trusted partners

**3** They are known for the quality of their curiosity



**2** They have a compelling story

**1** They own a client-centered purpose

