



# This is Advisor Alpha



# Advisor Alpha



Advisor Alpha is the sole responsibility of the Advisor.

The definable, detectable, desirable differences between advisors and their clients, prospects, and competitors.

The value of financial advice has been defined by the industry for many years. The legacy version of advisor value puts advisors somewhere between a salesperson and a trusted counselor. We are here to change that for the good of advisors and their clients.

**1. Your Advisor Alpha is unique to you.** In order to take complete control over the perception of your value you must be the one who defines the elements that encompass your alpha. Your value must be defined in your words in order to become Advisor Alpha.

**2. Your Alpha must be detectable by your ideal audience.** Your value must become tangible for digital detection and consumption. The experience of your value must elicit a feeling from clients and prospects alike.

**3. Your Alpha must be desirable.** Which means it must be unique to you and only available for a specific audience. In order for your value to become Advisor Alpha you must acknowledge this fundamental truth... you can't be all things to all people.



# This is not Portfolio Alpha

**Alpha** is used in finance as a measure of performance, indicating when a strategy, trader, or **portfolio** manager has managed to beat the market return over some period. ... The excess return of an investment relative to the return of a benchmark index is the investment's **alpha**.

Alpha is used in finance as a measure of performance, indicating when a strategy, trader, or portfolio manager has managed to beat the market return over some period. ... The excess return of an investment relative to the return of a benchmark index is the investment's alpha. Alpha may be positive or negative and is the result of active investing. Beta, on the other hand, can be earned through passive index investing.

Alpha is commonly used to rank active mutual funds as well as all other types of investments. It is often represented as a single number (like +3.0 or -5.0), and this typically refers to a percentage measuring how the portfolio or fund performed compared to the referenced benchmark index (i.e., 3% better or 5% worse).

When advisors associate their value with benchmarks that are too closely aligned with portfolio alpha, they are rendered helpless with the whims of ROI in capital markets.

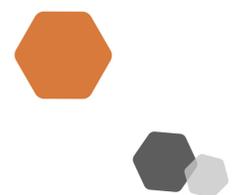
The perception of their value rises and falls with the ebbs and flows of the markets.

The relevant advisor aligns his / her value with benchmarks that are closely aligned to the value they **control the most**... and more often than not, those benchmarks are behavioral.

To remain relevant in the digital era of financial services you must put yourself in a position to promise your behavior.

Moreover, your behavioral promises need to be completely aligned with the value you can control the most.

So how do we discover the value  
we control the most?



# The Value Gap

Where does Advisor Alpha come from?

"To remain relevant in the digital age of financial services you must take complete control over the perception of your value."

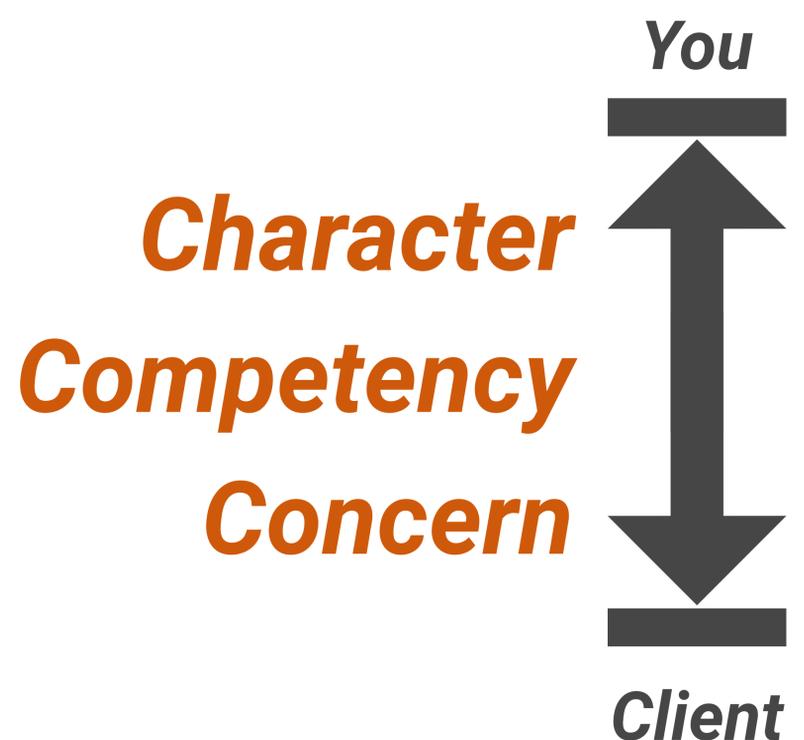
~ Grant Barger

There are three foundational elements that compose all relevant advisor value. They are character, competency, and genuine concern. All value can be derived from these three pillars and it is up to the advisor to expand this Value Gap to maximize his / her relevance.

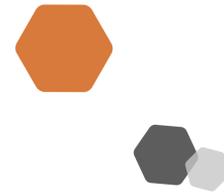
The challenge of advisor value is constant. You want to always be relevant and irreplaceable. To become irreplaceable you must take control of the perception of your unique value.

This means you must accept responsibility for your advisor value. It is entirely up to you to expand your Value Gap. No one else can do it for you.

The reason your Value Gap is so important... because it empowers you to take complete control over the perception of your unique Advisor Alpha.



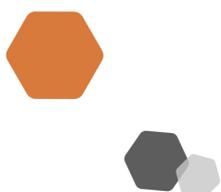
# Summary of Advisor Alpha

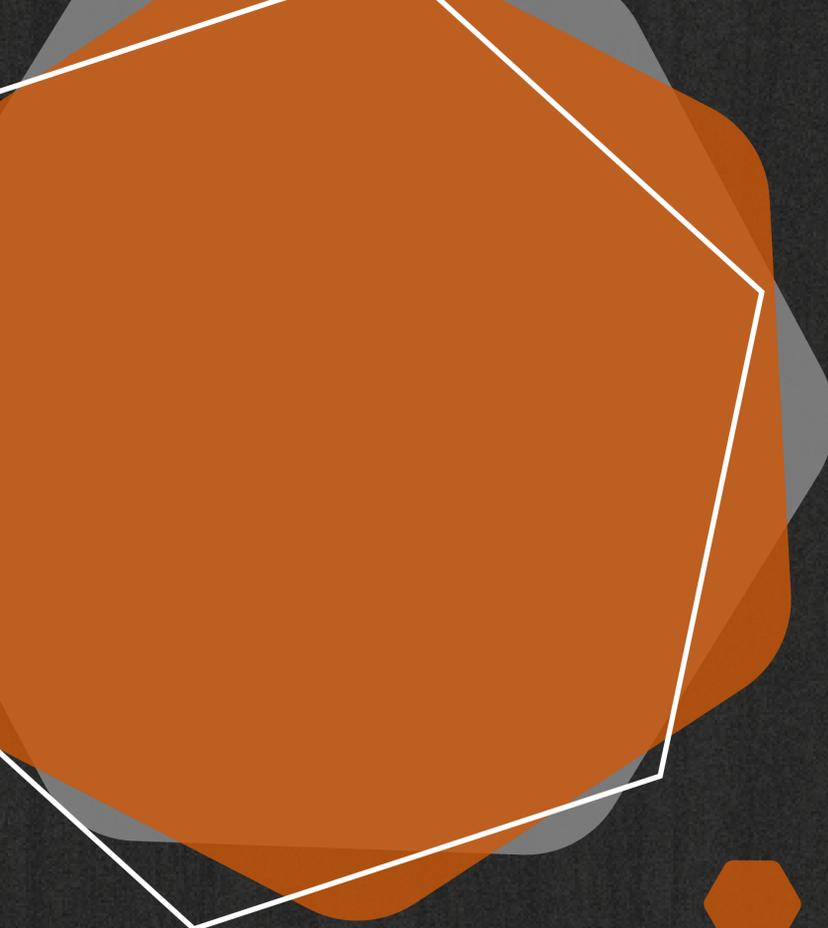


- 1. Advisor Alpha is the definable, detectable, desirable differences between the advisor and the client, the prospect, and the competition.**
- 2. Advisor Alpha is not portfolio alpha and should never be misconstrued as such.**
- 3. Advisor Alpha only exists if the advisor discovers their value, defines it in their own words, and designs it for digital detection.**
- 4. Advisor Alpha is derived from three foundational pillars of advisor value. Character Competency and Concern (The Value Gap).**

The most efficient way for financial advisors to discover define and design their Advisor Alpha for digital consumption is through the micro-modules of value design that are offered exclusively at [TangibleAlpha.com](https://TangibleAlpha.com).

Remember, if it's not tangible... it's not Advisor Alpha.





**TangibleAlpha.com**



We are Tangible Alpha... we help good advisors get better 24/7.

