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FAMILY BUSINESS ADVISOR

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FIVE WAYS TO EXPAND YOUR SUCCESSION PLANNING BUSINESS

There are five ways that attorneys can expand their succession planning business.

1) Knowing Thyself
2) Knowing Thy Clients: Establishing Trust and Building Rapport
3) Building Credibility by Working with Experts
4) Recognizing Everyone that Your Service Affects
5) Look at the 2nd, 3rd, 4th, etc. Tier Impacts of Your Services

This month, we will focus on **Knowing Thyself**. In the upcoming months, we will focus on each of the other four.

Knowing Thyself

To be successful in selling and providing any professional service, it is imperative that you first have a solid understanding of yourself, your clients, and your team. This knowledge is essential to demonstrate to your prospective clients what sets you apart from other practitioners, and why you are best suited to help them with their challenges.

To powerfully communicate the benefits of clients choosing you over other professional advisors, you need to know yourself and learn how to communicate what makes you unique in a few succinct phrases.

Begin by <u>taking one (or more) of the many personality tests</u> that are readily available, such as Success Insights (DISC), Keirsey Temperament Sorter, Myers-Briggs, Kolbe, etc. You can find these tests easily by doing an internet search. These tests can give you great insight into your strengths and weaknesses. They help you understand your core values and personality type.

At our firm, we also ask our employees to take a number of these tests. This helps identify the strengths and personalities of the various employees which is helpful information when communicating and assigning work.

Next, <u>identify what makes you unique</u>. What are your passions, your strengths, your skills, and your personality traits? Your personal brand, or image, is a combination of all of these things. Spend some time getting to know yourself.

<u>Understanding who you are may help you distinguish yourself from the competition</u>. This can be the foundation for communicating your unique value and your personal brand.

To be continued…

Coming in October 2008 – "Knowing Thy Clients: Establishing Trust and Building Rapport"

Steve Robison has assisted Professional Advisors and Family Businesses in successfully navigating the sale or transfer of their Family Business, with the lowest possible tax impact and with the greatest value for the parties involved!

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TAX AND BUSINESS

Board Certified in Federal Taxation Law since 2002.

Selected as Ohio Super Lawyer In Federal Taxation Law 2003-2008

Providing tax and business Advice to professional advisors.

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