

Press Release

External Communications

Multi-Financial Securities Corporation, Member FINRA/SIPC

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Multi-Financial white paper provides insight into key performance drivers of elite advisors

Multi-Financial Securities Corporation has released an in-depth white paper, *The Pulse of Practice Health* (www.multifinancial.com/practicehealth), which reveals there is a strong link between certain business activities and superior financial performance of an advisor's business. Information was gathered through the *Multi-Financial Advisor Benchmark Survey*, an innovative, web-based diagnostic tool that allowed each respondent to instantly gauge the health of their practice against peer averages.

"Multi-Financial is passionate about offering advisors resources and capabilities that enhance business health and propel growth," said **Dan Maurer**, Multi-Financial vice president, national sales. "*The Pulse of Practice Health* not only enables advisors to gauge the relative strength of their businesses against their peers, but also provides highly actionable insights into the key drivers of strong performance."

Highlights of the study include:

- **Client Segmentation:** Data shows that revenue per principal increases by 33 percent for firms that segment their client base and offer a differentiated level of service to their various client categories. While 81.2 percent of practices reported that they segment their client base, fewer than half (47.9 percent) offer a differentiated level of service.
- **Client Satisfaction Surveys:** The study shows an average of 31 percent higher revenue for advisors that survey their clients, however less than half (47.6 percent) of firms reported a formal feedback process.
- **Client Communications:** The report found there is a direct correlation between how often firms contact level "A" class clients and practice revenue. On average those that contact their best clients more than 12 times per year generate 68 percent more revenue per principal than those who make contact less than six times per year.
- **Business Planning:** There is a sizeable profit increase (47 percent) for businesses with a documented business plan, however only 21.6 percent of firms report having their plan in writing.

"This study reinforces how important it can be for advisors to work with a broker-dealer that offers guidance and dedicated one-on-one support to help them integrate these key business drivers into their practices," Maurer added. "We give our advisors the freedom to pursue their vision of independence, to run their business their way, but we also believe it is our job to arm them with the best practices, tools and people support they need to make their vision a reality."

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About Multi-Financial Securities Corporation

Multi-Financial Securities Corporation, headquartered in Denver, Colo., is a full-service securities brokerage firm. Founded in 1981, Multi-Financial provides industry-leading products and services to more than 1,000 financial professionals nationwide.

The financial professionals of Multi-Financial have the flexibility to choose products that best suit their clients' financial needs and objectives. Multi-Financial offers efficient and convenient access to an extensive network of people, products and services, and is committed to helping its affiliated representatives place clients' interests first. Multi-Financial delivers regulatory supervision, guidance, and training to all of its financial professionals, and provides the tools needed to build clients' wealth, plan their legacies, and reach their financial goals.

Multi-Financial, a part of Cetera Financial Group, is a member of the Securities Investor Protection Corporation (SIPC) and a member of the Financial Industry Regulatory Authority, Inc. (FINRA). For more information, see www.multifinancial.com.