ARCHWAY

STRATEGY & CONSULTING

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Redefining **Value** for the

MODERN HNW CLIENT

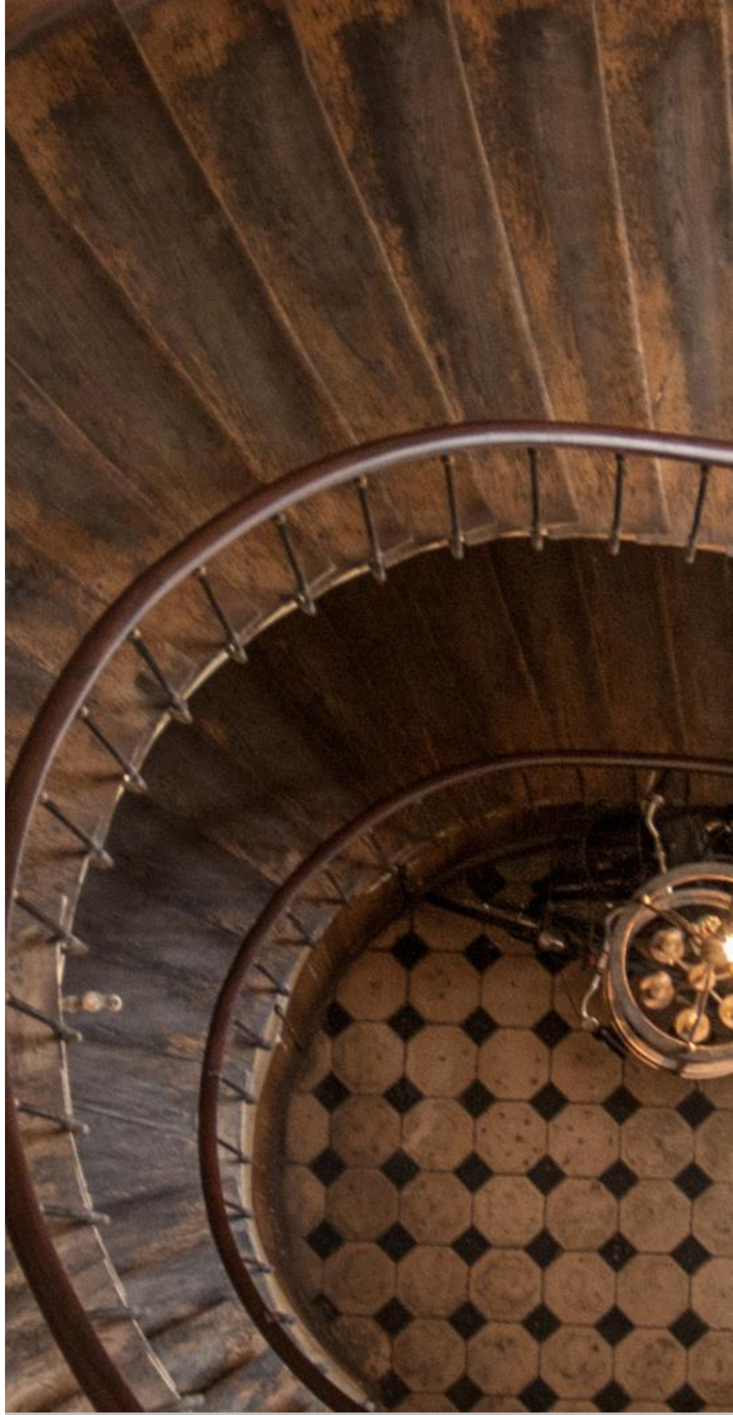
Elevate Your Strategy

High-net-worth clients no longer settle for standard advice — they expect foresight, innovation and an experience built around their values.

In this session, we are going to:

- Forge a compelling value proposition that helps to showcase your unique differentiators
- Assemble a client-experience model that resonates
- Leverage behavioral finance and case studies to deepen trust, differentiate your offering, and fuel business development.

***This session qualifies for CE credit by incorporating client behavior theory, communication strategy, and planning best practices relevant to high-complexity client relationships.**



Prospecting to the Affluent
Core Concepts

MODERN APPROACH
The modern HNW mindset and what affluent clients expect today.

KEY PLANNING DOMAINS
Discuss key domains like tax, risk, philanthropy, family dynamics, business exit, liquidity and legacy.

ADVISOR'S ROLE
Cover the advisor's evolving role as a strategic coordinator and connector.

CLIENT EXPERIENCE
Develop a practical framework for redefining your client experience from discovery to multigenerational continuity.

BEHAVIORAL FINANCE
Learn more about key behavioral finance concepts: framing, anchoring & familiarity bias.

STRATEGIC MESSAGING
Messaging as a business development tool: how trust is built through clarity.

CASE STUDY
Launching a profitable business transition planning vertical by listening to client needs and creating a high-value service offering.

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Abby Arcishewsky

PRESIDENT & FOUNDER

About Abby

Abby Arcishewsky brings over 20 years of leadership experience in private-client firms and multi-family offices

She partners with advisory teams to:
•Craft high-impact business development and marketing strategies,
•Refine value propositions,
•Optimize client experiences, and
•Cultivate top-tier, high-net-worth relationships.

Abby holds the designations of Certified Exit Planner (CExP®) and Chartered Advisor in Philanthropy (CAP®).

Modern Approach

Affluent clients are no longer just seeking financial solutions — they expect a planning experience that anticipates complexity, reflects their values, and integrates seamlessly into their broader personal and professional lives.

- HNW clients want more than performance — they want a dynamic scope of work that addresses all aspects of their financial life
- Planning must reflect the nuances of lifestyle, legacy, and liquidity
- Advisors must shift from "answering questions" to *leading vision*

Key Planning Domains

Modern planning engagements must extend beyond core services to include sophisticated needs like tax mitigation, risk transfer, philanthropy, and business transition — all tailored to individual circumstances.

- Planning conversations should integrate cross-disciplinary concerns (legal, tax, family)
- Specialized needs like liquidity access and private lending require curated solutions
- Coordinated guidance across domains positions the advisor as indispensable

Advisor’s Role

Clients increasingly expect advisors to function as strategic connectors — leading a team of specialists and proactively managing complexity rather than simply reacting to requests.

- The advisor is now the “quarterback” of the client’s financial ecosystem
- Clients reward clarity and coordination over isolated expertise
- Value lies in experience, connectivity and strategic leadership, not just services

Client Experience

An intentional, values-driven client experience fosters trust, deepens relationships, and creates long-term continuity — especially when serving multi-generational families.

- Discovery must go beyond fact-finding to uncover goals, values, and dynamics
- Onboarding, review meetings, and communication must reflect strategic intent
- A mapped, repeatable experience ensures consistency across all client touchpoints

Behavioral Finance

Trust and decision-making are shaped by how clients *feel* about your advice — not just the facts you present. Behavioral finance principles help advisors guide clients more effectively.

- Framing impacts how clients perceive outcomes and risk
- Anchoring sets the reference point for trust and value
- Familiarity bias influences how aligned and comfortable clients feel with you

Strategic Messaging

A dynamic value proposition is more than a tagline — it’s a business development asset that opens doors, builds trust, and aligns expectations from the first interaction.

- Messaging should reflect both technical depth and emotional intelligence
- Clarity builds trust before numbers ever come into play
- Discovery sessions are the proving ground for your positioning strategy

Case Study

How One Advisory Team Successfully Moved Upmarket by Repositioning as Strategic Quarterbacks

Advisor Profile:

- Regional advisory team with strong success in the mass-affluent space
- Desired to break into the HNW market, focusing on $10M+ net worth business owners and executives
- Realized their existing approach wasn’t sophisticated enough to win or retain top-tier clients

Case Study: The Challenge

The team understood that successfully moving upmarket required more than prospecting—it demanded a complete repositioning of their brand, messaging, and client experience.

Key Gaps Identified:

- Conversations were focused on solutions, not the real pain points of HNW clients (complexity, disjointed advice, and lack of strategic leadership).
- No clear, differentiated Value Proposition (VP) tailored to the emotional and financial needs of affluent clients.
- Client experience lacked structure – there was no workflow to deliver on the elevated promises HNW clients expect.

Case Study: The Solution

Developed a Dynamic, Differentiated Value Proposition

Crafted a clear and compelling VP focused on their role as a strategic quarterback:

“We coordinate every financial decision across your advisory team to eliminate complexity, uncover hidden risks, and ensure no critical opportunities fall through the cracks.”

Built Out a More Dynamic Scope of Work

Expanded service offerings to include not just planning and investment management, but also high-touch coordination of tax, legal, and estate strategies.

Positioned their services to align with the real-world complexity HNW clients face, rather than transactional financial planning.

Partnered with OPS to Create a Formal HNW Client Workflow

Established a structured, repeatable process for onboarding, ongoing strategic reviews, and proactive outreach.

Leveraged CRM to automate key touchpoints and ensure seamless coordination across all client relationships.

Refined Messaging Using StoryBrand Principles

Shifted from describing “what they do” to focusing on client pain points and the emotional burden of managing their own financial lives.

New Messaging:

“Most successful business owners are surrounded by advisors, yet no one is stepping up to lead. That’s why we exist—to take that burden off your plate and help you avoid costly mistakes before they happen.”

Case Study: The Outcome

$20M	Won their first $20M AUM client within 90 days of implementing the new strategy.
45%	Increased HNW prospect conversion rates by 45% within 6 months.
30%	Boosted high-quality COI referrals by 30% after clearly communicating their unique role as strategic coordinators.
∞	Elevated their reputation in the market as a firm equipped to handle the complexity HNW clients expect.

Are you ready for the **greatest** wealth transfer?

80 TRILLION
Of Assets are set to transfer in the next 20 years

80%
Of Advisors don't have a solid plan to retain those assets through succession planning

90%
Of those assets will transfer out of your book to another advisor

31%
Of national wealth will be in the hands of Gen X by 2030

When you have a plan, you can achieve **next-level results.**

INCREASED REVENUE

An organized sales and service process that leads to revenue attribution and referrals

EFFECTIVE NETWORK

A defined Influencer network and spending time with the right people

IDEAL CLIENTS

Onboarding clients that are aligned financially and culturally

CURATED MARKETING

Defined sales and service strategy with the right marketing material to tell your story


DELIVER EXPERIENCES THAT
DEEPEN RELATIONSHIPS