

### CHALLENGE

A respected regional brokerage firm engaged Patpatia & Associates to design and implement a comprehensive bank solution distribution strategy to enhance asset aggregation initiatives.

### PATPATIA & ASSOCIATES ACTIVITIES

- ✓ Competitor benchmarking of other regional brokerage programs to assess successful business components of banking services
- ✓ Development of a strategic business plan to adopt a full breadth of bank offerings through current proprietary channels
- ✓ Launch of work and information flows necessary for product support and education for advisors
- ✓ Seamless integration of technology and administrative requirements for multiple strategic vendor relationships
- ✓ Establishment of cross-selling and incentive strategies facilitate advisor adoption and active marketing and selling banking solutions to clients



### THE RESULTS

Our client utilized the distribution strategy, technology and administrative requirements, and tactical marketing and sales approach to implement a highly disciplined and formalized banking program. The addition of the banking services has allowed the firm to increase its asset under management by 20%.