

CWS® Impact Survey
Preliminary Results
August 2009



In August 2009, in order to determine the impact of the Certified Wealth Strategist® course of study, the CWS® Board of Standards administered a survey to individuals who hold the Certified Wealth Strategist® certification. The following results are preliminary and we want to share the results with you.

Respondents indicate that the CWS® program of study has driven increased production for all that have implemented its strategies and tactics.

Respondents reported a production increase of at least **25% or greater** comparing pre-CWS® to post-CWS® production.

The highest reported increases were with the following CWS® objectives:

- Expanding relationships with current clients and attaining additional client assets from current clients
- Obtaining introductions from existing clients
- Attaining new clients
- Obtaining introductions from COI's
- Activities in new market niches

Did completing the Certified Wealth Strategist® help grow their business? Yes

The CWS® program is built upon field tested best practices and tools:

- 13 Wealth Management Issues
- Communication Standards
- A Defined Client Experience
- Absolutes & Touch points
- Gap Analysis

What would a 25% increase mean to you and your practice?

Here is a story of Joe. Prior to attending the Certified Wealth Strategist® program of study, he was a \$500K producer. Upon obtaining the CWS® skill set, Joe had increased his production to a \$625K producer within one year.

The return on his investment, investment being time and money invested into obtaining the certification, Joe spent \$3200 and 144 hours of time* for a total monetary/time investment of \$32K.

Within that year his production increased to \$625K (25% increases). This is a 290% return on investment (time and money). Can you afford a 290% return on your investment?

**Assuming \$200/hour fee*

Here is a story of Elizabeth. Prior to attending the Certified Wealth Strategist® program of study, she was a \$1M producer. Upon obtaining the CWS® skill set, Elizabeth had increased her production to a \$1.25M producer within one year.

The return on her investment, investment being time and money invested into obtaining the certification, Elizabeth spent \$3200 and 144 hours of time* for a total monetary/time investment of \$32K.

Within that year her production increased to \$1.25M (25% increases). This is a 681% return on investment (time and money). Can you afford a 681% return on your investment?

**Assuming \$200/hour fee*