The Modern Independent Financial Advisor

An investor’s everyday superhero

Nearly a third of independent financial advisors report that they relate to Superman’s all-around ability to tackle multiple challenges at once.

It is not surprising that independent advisors identify with the Man of Steel. Today’s advisors spend their time at the office juggling multiple responsibilities. But it’s “all in a day’s work” for advisors, who know the key to success is a healthy balance between work and play. When they are not helping investors meet their financial goals, advisors unwind by pursuing a range of hobbies and interests.

Advisors at work

Above and beyond

Are providing more services for clients and/or putting more time into each client without increasing fees

84%

A calming presence

Have had to ease client concerns over the past six months

84%

Harnessing superpowers

Use advances in technology to help keep their firm ahead of the curve

76%

Early birds

Most productive in the early hours of the day

69%

Advisors at play

Competitive spirit

Will win an endurance race or a sport with a racket or ball

48%

Prefer a repast

Given $100 and a bit of spare time, the first choice would be dining out

42%

Learning from history

Most likely to be found watching The History Channel in spare time

39%