



Video series: Three themes for financial advisors in 2022

February 02, 2022

Advisors could face a challenging year as they grow their practice. Here are three ways to serve current clients well and gain new business in the year ahead.

1. Set realistic expectations with your clients. After last year's outsized market gains, clients may need to be reminded of the value of managing risk and being well-diversified.



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Head of Intermediary Markets

2. Help your clients prepare for a changing tax environment. If investment returns are harder to come by this year, your clients will want to keep more of what they do earn.



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3. Position your practice to serve a broader client base. Connecting with more diverse clients will be critical to your practice's future growth.



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