

What problem do I solve?

Your niche is hiding in your own career: the clients you helped most, the ones who didn't fit, and the work that never feels like work. Answer honestly. There are no wrong answers, and the more specific you are, the sharper your niche will be.

NAME

FIRM

DATE

1

What are you good at?

Bright spots: the moments clients remember you for.

- 1** Think of the client who thanked you most sincerely. What problem were they facing when they first came to you?

- 2** Which part of your work do clients praise most? *Tick all that apply.*

- | | |
|---|--|
| ☐ Tax planning | ☐ Retirement income |
| ☐ Insurance & protection | ☐ Estate & succession |
| ☐ Investment management | ☐ Business owner planning |
| ☐ Coaching through big decisions | ☐ Other: _____ |

- 3** When a colleague is stuck on a client case, what do they come to you for?

2

What are you not good at?

Failures and friction show you where you're not the right fit.

- 4 Think of a client relationship that ended badly or never took off. What did that client need that you couldn't or didn't want to give?

- 5 Which tasks or client types drain you, even when you do them well?

- 6 Have you lost a prospect to another advisor? What did they offer that you didn't?

3

What is your default?

Doctors, dentists, business owners... who do you end up serving?

- 7 Without looking at your book, who is your typical client? *Occupation, life stage, wealth level.*

- 8 Now look at your top 20 clients. What do they share? *Tick all that apply.*

- | | |
|--|--|
| ☐ Same profession | ☐ Same life stage |
| ☐ Same life event or transition | ☐ Same community or culture |
| ☐ Similar wealth range | ☐ Same referral source |
| ☐ No clear pattern yet | |

- 9 Is your default the client you chose, or the one who happened to find you?

- ☐ I chose them ☐ They found me ☐ A mix of both

4 What are your pockets of success?

Where results, referrals and loyalty already cluster.

10 Which client result are you proudest of? *It doesn't have to be the biggest account.*

11 Which client group brings you the most referrals?

12 Which type of client has stayed with you the longest?

5 What is effortless?

It's work, but it doesn't feel like working.

13 Which client conversations make you lose track of time?

14 What part of your work would you happily keep doing for free?

15 How do you feel after each activity? *1 = drains me, 5 = energizes me.*

Discovery meetings	(1) (2) (3) (4) (5)	Building financial plans	(1) (2) (3) (4) (5)
Tax & income strategy	(1) (2) (3) (4) (5)	Insurance conversations	(1) (2) (3) (4) (5)
Guiding life transitions	(1) (2) (3) (4) (5)	Investment reviews	(1) (2) (3) (4) (5)
Teaching groups	(1) (2) (3) (4) (5)	Prospecting & networking	(1) (2) (3) (4) (5)

6

Don't take your word for it

Tell clients you need their help. The blunter they are, the sharper the image you can project.

- 16 Ask three clients: **"What problem did I help you solve that you couldn't solve on your own?"**

CLIENT 1

CLIENT 2

CLIENT 3

- 17 Ask them: **"How would you describe what I do to a friend?"**

- 18 How closely do their answers match yours to questions 1 and 10?

☐ Very closely ☐ Somewhat ☐ Not at all, and that's revealing

7

Your answer: what problem do I solve?

Look back at your answers and complete the sentence.

I help

_____ who you serve

who are worried about

_____ the problem

so they can

_____ the outcome

EXAMPLE

"I help Canadians within 10 years of retirement who are worried about running out of money or overpaying tax, so they can spend their retirement comfortably."

Find your hook

The immediate, attention-grabbing line that makes people lean in. Start from your Question 19 sentence.

A Gather your raw material

Use your answers from pages 1–4

A client's exact words about you (Q16–17)

What you stop clients from doing

What other advisors do that you don't

The moment clients need you most

How clients feel after working with you

Something true that people wouldn't expect

B Draft one hook for each pattern

Don't judge yet. Quantity first.

REVERSAL My clients pay me to

CONTRAST Others

, I

ENEMY I stop people from

MOMENT I'm who you call when

CLIENT
QUOTE

"

"

C Test it out loud

Hooks are spoken, not written

Say your top three to a partner as the answer to "So what do you do?" Tick what happened with your best one.

☐ Asked a follow-up

☐ Laughed or smiled

☐ Repeated it back

☐ Polite nod only

D The hook scorecard

My hook:

☐ **Under 12 words.** It fits in one breath.

☐ **Creates curiosity.** People ask "What do you mean?"

☐ **Sounds like me.** I'd say it out loud at a barbecue.

☐ **Points to my problem.** The follow-up leads to my Q19 answer.

☐ **No jargon.** No "holistic," "comprehensive" or "solutions."

☐ **Only I could say it.** It wouldn't fit the advisor down the street.

☐ **True and provable.** I can back it with a client story.

☐ **Compliance-safe.** No promised returns or guaranteed results.

7–8 ticks: ready to use

5–6: one more pass

Under 5: back to Part A

