Is your COI network fueling growth?



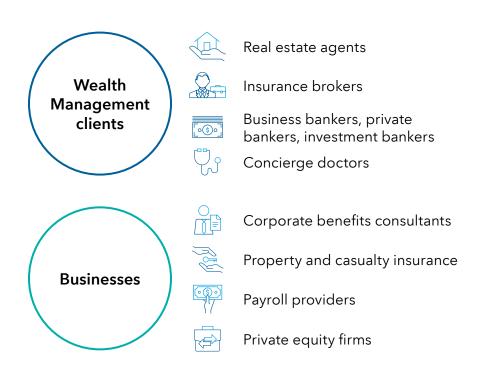
Strategic partnerships are essential for expanding your client base. Use these strategies to help strengthen your center-of-influence (COI) relationships, optimize referrals and grow your practice:

- **1. Partner with purpose:** Align with COIs who share your target market, services and culture.
- ★ 2. Expand your network: Seek COIs beyond traditional sectors, targeting those who match your niche.
 - **3. Empower your team:** Equip everyone to build productive professional relationships.
- ★ 4. Clarify your niche: Ensure COIs know your ideal clients and can effectively refer them.
- ★ 5. Co-host events: Collaborate with professionals to engage both of your client bases.
 - **6.** Set referral goals: Implement referral targets for transparency and accountability.

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Expand your network: Target COIs beyond accounting and legal

If you're focused solely on tax professionals and attorneys, you may be missing out on opportunities to target other types of COIs who can help you attract and retain your ideal clients.



Clarify your niche and key differentiators

To strengthen your COI relationships, clearly define your niche, and demonstrate how your services are tailored to meet the unique needs of those clients.

EXAMPLE NICHE 1

EXAMPLE NICHE 2

Step 1 Identify your target market	Step 2 Showcase key differentiators	Step 3 Focus on relevant COIs
Business owners with 500 employees and fewer	 Wealth and retirement planning for clients whose businesses comprise a significant portion of their assets. Employee benefits and business insurance consulting on business management and protection from liability. Tax planning and business valuation services that address wealth preservation and navigating M&A. 	 Accountants Business consultants Insurance advisors
Corporate executives with complex compensation structures	 Equity compensation strategies designed to simplify the complexities of stock options, restricted stock and other non- cash compensation. Comprehensive wealth planning strategies to effectively manage concentrated stock positions and optimize tax efficiency. Risk management and asset protection strategies aimed at safeguarding personal assets while addressing potential business- related liabilities. 	 Tax advisors CPAs Executive recruiters Private bankers

★ Co-host events

Building alliances with COIs through joint events allows you to tap into new networks, share expertise and position yourself as a business leader.

Small business solutions

Bring together COIs to address key issues for small businesses, including cash flow, access to capital, HR, employee benefits, technology, marketing and customer acquisition.

- Target clients: Business owners, chief financial officers and HR staff of small businesses
- **COIs:** Business bankers, HR consultants, group benefits advisors, property and casualty insurance specialists, payroll providers, IT service providers and digital marketing agencies

Wellness and retirement planning

Host an event on holistic wellness and retirement planning, targeting clients and prospects nearing or in retirement. Focus on health and wellness, retirement income strategies and Social Security optimization.

- Target clients: People 50 and older
- **COIs:** Concierge doctors, dieticians and wellness coaches, Social Security and Medicare specialists

Legacy planning with life insurance

Organize a workshop on the intersection of estate planning and life insurance, providing insights on protecting and passing down generational wealth.

- **Target clients:** High-net-worth and ultra-high-net-worth individuals and business owners concerned about legacy planning and preserving wealth
- **COIs:** Life insurance specialists, estate planning attorneys and tax advisors

Employee benefits planning

Host a symposium to help employers manage complex employee benefits, including retirement and health plans.

- Target clients: Companies with 100 1,000 employees
- **COIs:** ERISA* attorneys, recordkeepers, third party administrators, actuaries and employee benefits consultants

*The Employee Retirement Income Security Act (ERISA) is a federal law that protects participants in private sector retirement and health plans.

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