## **CONTENTS**

PREFACE		IS IT TIME TO ATTACK OR TO RETREAT?	ix
CHAPTER	di cara	TREATING YOUR FINANCIAL PRACTICE LIKE A SMALL BUSINESS	1
CHAPTER	2	SEGMENTATION	31
CHAPTER	3	REFINING YOUR NICHE STRATEGY	61
CHAPTER	1	KNOWING YOUR BRAND	81
CHAPTER	5	THE CLIENT'S DECISION-MAKING PROCESS	107
CHAPTER	6	INVESTOR PSYCHOLOGY AND BIASES	131
CHAPTER	sacray Z	QUANTITATIVE CLIENT RELATIONSHIP MANAGEMENT	169
CHAPTER	8	INTEGRATED MARKETING COMMUNICATION MANAGING ADVERTISING, WEB SITE DESIGN. AND WORD OF MOUTH	

## viii CONTENTS

CHAPTER 9	TACTICS AND BEST PRACTICES	209
CHAPTER 10	PUTTING IT ALL TOGETHER: YOUR Marketing Plan	227
APPENDIX	EXPANDED SURVEY RESULTS	237
References		255
Acknowledgments		
Index		259