

Commoditization of Professional Services

"A RACE TO THE TOP"

Accounting
Legal
Financial
Services



Threats are here now

- Online
- Cheaper
- No advice
- Document Production in volume
- Discounts
- Consumer educated/aware
- Overseas competitors

Value sits in



- Complexity
- Sense Maker
- Intergenerational wealth
- People issues
- Business succession
- Family Board
- General Counsel
- Risk Manager
- Merger & Acquisition
- Total Balance Sheet

FORM

• Retainers • Product free • Project management • Collaboration

Skill Set Required

POSITIONING	CONTEXT/CONTENT	PEOPLE SKILLS EMOTIONAL INTELLIGENCE	PLAN	MANAGE
Ability to position yourself and the service	Ability to hold context	Ability to collaborate	Ability to construct lifetime plan	Ability to manage: <ul style="list-style-type: none"> • Total balance sheet • Risk frameworks • Tax • Legal • Investment