Jim Wise offers actionable practice management ideas that can open doors to significant Kingdom impact and help us build thriving practices, lead our teams more effectively, and serve clients with excellence.

Insights from Jesus cursing the fig tree (Mark 11:12-14; 20-21)

The reason the tree had no fruit: it wasn't fruit season

The reason Jesus cursed the tree when it wasn't fruit season: its deceptive external appearance

"in leaf" (vs. 13) - trees with full leaves are expected to be full of fruit

Self-examination for the advisor: What does Jesus find when he looks under the leaves?

God's ultimate purpose for my practice: to bear abundant spiritual fruit.

Fruitful Hiring Practices

Minimize hiring mistakes and the disruption they bring

Look when I'm not looking.

Always building a deep-bench list of ideal future candidates

Define ideal characteristics of new team members in advance.

Especially in areas of personality, attitude, and relational skills

Quickly move toward separation and replacement when it's clear we've hired someone who's not a good fit.

Fruitful Client Service

There is only one person who can identify and define the ideal client service model: the client.

Remembering this truth ensures excellent client service and saves my team from unnecessary work that isn't wanted or valued by clients.

Kingdom Advisors is the leading advocate for the Christian financial industry.

We offer a step-by-step process to confidently deliver advice that aligns with Christian values.

Study Groups connect like-minded peers for encouragement, best practices, and accountability.

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Help each client describe **their own** ideal service model.

Then seek to tailor our service model to each client's preferences and needs. If I'm unable to provide that service model, I need to help the client find and connect with another advisor who is a better fit.

Discuss their preferred contact routine.

Email or phone call, Zoom or in-person meeting, frequency of contact

Discuss their preferred presentation of financial information.

"It will help me to serve you better if I understand how you prefer to have financial information presented. Which of these styles of financial communication would you prefer?"

Some clients are detailed-oriented: spreadsheets and financial detail

Some clients prefer summaries: one-page chart or graph

Some clients are not interested in charts, graphs: simple, bullet-point list of action items

Some prefer no printed output: present financial information conversationally

Discuss their definition of a successful client/advisor relationship.

Learn about their client service experiences:

What were their best and worst client service experiences?

What were the key factors that made the relationship either good or bad?

What could the service provider have done differently, or done more of, to better the experience?

Uncover their client service expectations.

Sometimes unconscious or shaped by prior experiences with other financial advisors

Explore and define their desired outcomes.

Financial metrics and emotional ones. Allows advisor to frame presentations, recommendations, and annual reviews in terms that reflect outcomes the client values.

Guiding each client to help craft their ideal service model frees up more time to build deeper client relationships and saves time spent creating output that doesn't meet the client's needs or desires.

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Discussion Questions

1. What stood out to you in this teaching?
2. Jim Wise recommended that we develop relationships with a number of potential candidates before we need to hire. How would you approach developing those relationships?
3. If the client is the one who should define a successful relationship, how do you or would you draw out client expectations?

Personal Reflection

1. Am I truly bearing fruit for Christ in my practice or just producing leaves?
2. Am I looking for opportunities to witness, disciple, and share God's truth with my clients, or am I content to focus on superficial relationships, assets under management, and annual revenue?

What is my next step as a result of this study?

How will I accomplish that?

By when?

Additional Resources for Further Study:

Paul Anthes' brief video and accompanying worksheet on "Defining Success" will guide you to carefully determine your personal view of success and help you integrate that definition into your life.

How to Define Success (video)
Defining Success Worksheet (tool)

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