



# Top Client Niche *Inventory*

Use this form to evaluate your current clientele, looking to discover trends that will guide you toward selecting one of the six niche categories. The niches are listed left to right in order of how compelling they can be to prospective clients. If you don't instantly know who your niche is, this can be a helpful and informative process!

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	 <b>AFFINITY</b> Sharing common social circle. <i>Ex. yacht club, PTA, etc.</i>	 <b>VALUES</b> Sharing similar philosophy, life values. <i>Ex. hospital board, Big Brothers/Big Sisters, etc.</i>	 <b>EDUCATION</b> Imparting critical life transition knowledge. <i>Ex. inheritance receivers, lottery winners, within 5 years of retirement, etc.</i>	 <b>PSYCHOSOCIAL</b> <i>Guiding during life transition.</i> <i>Ex. divorcing women, widows/ers, etc.</i>	 <b>EXPERIENTIAL</b> <i>Promoting "best" or "very different" service.</i> <i>Ex. the coffee shop advisor, only virtual, etc.</i>	 <b>TECHNICAL</b> Providing advanced, highly specialized service. <i>Ex. advanced tax planning, federal employees, etc.</i>
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