



Staffing Strategies for Success

What role do you want to have in
the firm?

CEO or Rainmaker

Your Path to One of the Above:

1. Hiring
2. Onboarding & Training
3. Roles and Responsibilities

1 STAFF
PERSON FOR
EVERY
\$250,000 IN
REVENUE

So, when and for what roles do you hire?



HIRING HISTORY:

2011 – 17M: PT CSA

2014 – 26M: FT CSA

2017 – 38M: CSA, Ops

2019 – 52M: CSA, Ops, PT Mkting

2023 – 121M: CSA, PT Mktng, Rec/EA, CFP

2024 – 143M: CSA, Ops, PT Mkting, Rec/EA, PT CFP
Considering CFP/Service Advisor



ROLES & RESPONSIBILITIES:

JIM NOWAK, CFP, AIF

- Firm Vision, Values & Strategy
- Client Meetings
- Speaking and teaching
- Prospect Meetings
- Investment and Planning Strategy



Krystal Nowak

Dir. of Communications

- Website, social media, whitepapers
- Webinars (monthly)
- Lunch & Learns (quarterly)
- Client Appreciation Events
- Team outings



Skyler Wofford

Client Services Associate

- Service Requests
- Operations (ppwk, accts)
- Retirement Classes
- New Client Onboard
- Prospect Funnel



Corrine McFarlane

Client Relations & EA

- Reception
- Client Surge Scheduling
- Prospect to New Client Process
- Meeting Prep
- EA (email, calendar, personal)



Scott Poulsen

Wealth Planning Coordinator

- Technology Ambassador
- Planning: data gathering, analysis, del.
- Client deliverables (quarterly)
- Surge prep and meeting follow up
- Client meeting support



Hiring History:
2011: First hire, PT
Office Manager
2013: Moved to FT



Integrated Planning
& WEALTH MANAGEMENT



2018

Cathy Sutter
Practice
Manager



2021

John Bohnsack, CFP®
Wealth Advisor



2023

Kate Skowronek, CFP®
Client Service Advisor



2024

Tracy EA
Community
Manager



KYLE ANDREE
20/20 Money Producer

+ OTHERS:
Marketing Automation

Content Writer

Branding & Design

Website Manager

Compliance Consultant

A close-up photograph of a glass of water being poured, with a stream of water falling into the glass, creating bubbles. The background is dark teal with a graphic of several overlapping, curved teal lines on the left side. The text is centered over the glass.

Hire **BEFORE** You Get to
Capacity

The text "Q&A" is centered in white, with a white underline beneath the ampersand. To the left of the text are three overlapping teal circles of varying sizes, creating a decorative graphic element.