



# Think You Don't Have a Niche? You Actually Have Several.

A step-by-step framework for defining your ideal client profiles and turning them into messaging that connects with both prospects and AI tools.

## STEP 1

### Think back to your best clients

For each of your strongest client relationships, ask: what was happening in their life when they first reached out? Don't think about demographics. Think about the moment that sent them looking for an advisor.

#### COMMON TRIGGERS ADVISORS FIND

Sold a Business

Caring for an Aging Parent

Approaching Retirement

Going Through a Divorce

Lost a Spouse

Inherited Money

New Child or Grandchild

RSUs or Equity Vesting

## STEP 2

### Find the patterns

Look across your client list. What life moments keep showing up? Most advisors can bucket their best clients into 2-5 recurring trigger events. Those are your niches – and you don't have to pick just one.

### STEP 3

#### Name the problem, not the person

For each trigger event, identify the specific problem they came to you with. This is the language that belongs on your website – and what AI tools scan for when deciding who to recommend.

✗ Describing the person	✓ Describing the problem
I work with business owners	I help people navigate the financial complexity that comes with selling a business they've spent years building
I serve retirees	I work with people who are 3–5 years from retirement and aren't sure if their plan will actually hold
I advise high-net-worth families	I help families facing a sudden liquidity event figure out what to do next, without making a costly mistake

### STEP 4

#### Choose your top 3 and prioritize

You don't need to serve just one type of client, but your website and marketing should focus on 3 trigger events maximum. Pick the ones where you have the clearest story and the most experience to back it up.

Questions to help you prioritize:

- Where do you have the most experience?
- Where do referrals already tend to come from?
- Which clients energize you most?
- Where is there real opportunity in your market?

## STEP 5

### Turn each trigger into a messaging statement

“When [trigger event] happens, people come to us because [the problem they need solved]. We help them [the outcome you deliver].”



#### Example — Business sale

*“When our clients sell a business they’ve spent years building, they often don’t know what comes next financially. We help them build a plan that protects what they’ve earned and sets them up for what they actually want to do next.”*



#### Example — Loss of a spouse

*“When someone loses a spouse, the financial decisions that follow can feel overwhelming. We help people in that moment slow down, understand where they stand, and make confident decisions without pressure.”*

### Before you’re done — a quick check

- ✓ Does it describe a problem, not just a type of person?
- ✓ Could a prospect read it and think “that’s exactly me right now”?
- ✓ Is it specific enough that an AI tool could cite it as a reason to recommend you?
- ✓ Would you say it out loud to someone at a dinner?

## Your Marketing, Done For You

FMG’s Do It For Me program delivers a monthly content calendar and pairs you with a concierge who helps you customize it to your niche and executes all of it on your behalf.

**You show up. We handle the rest.**

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