

Wealth Management



Notes:

The base of the pyramid includes low risk - low return investments that chug along without a lot of up or downs in their returns. Think of these as smaller accounts that you have had a long time or that your routine branding and marketing activities generate at a regular rate.

The middle portion of the pyramid has more fluctuation but offers higher returns. Think of these as mid-size accounts that you acquire through direct sales efforts by your sales team or through a sales channel.

The apex of the pyramid is the high risk and high reward segment of your strategy. Whale hunting happens at this level.

We've drawn a red line between the middle point and the high points in the investment pyramid. Everything below this line will grow your business at a market standard for growth in your industry.

*From Whale Hunters Wisdom
"Whale Hunting and Wealth
Management"*