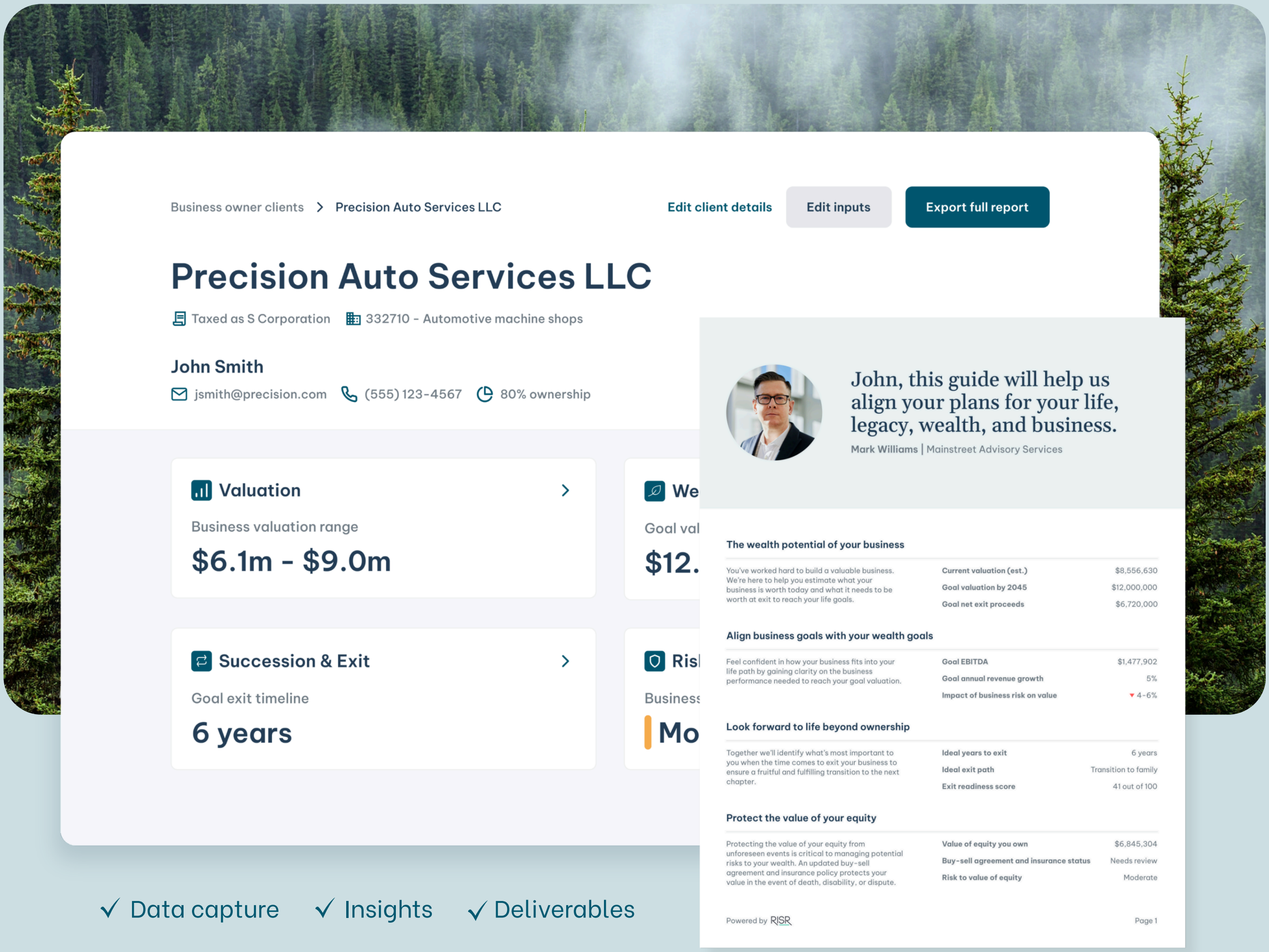


Playbook

How to position valuation & business insights to clients and COIs

A practical toolkit for financial advisors to unlock opportunities by integrating business value and insights into planning

www.risr.com

"The goal of this playbook is to equip you with practical language and a structured approach so you can unlock better conversations that build trust, create momentum, and open the door to deeper planning opportunities with owners."

Cory Siegfried
Chief Client Officer @ RISR

Playbook contents

SECTION 1

A Five-Step Process for working with business owners

Business owners need structure, but they also need simplicity. This section introduces a practical, repeatable workflow you can use with any owner — regardless of business size, industry, or planning readiness.

Each step builds upon what great advisors already do: frame the importance, gather the right information, deliver meaningful insights, and translate those insights into wealth, risk, exit, and tax planning conversations.

1. Frame the importance of a business valuation clearly

Show owners that business valuation is a normal, essential part of planning.

"Estimating business valuation gives us the clarity we need to complete your financial plan."

2. Schedule a meeting to review the process

Generate momentum by showing owners the steps to the process:

1 Gather financials 2 Complete survey 3 Review estimates 4 Update plan

3. Dedicate a followup meeting to review and complete data intake

Having a followup meeting to review the data encourages owners to share data key data and makes the process more seamless for them.

4. Deliver initial insights

Walk through business value, risks, opportunities, and alignment with personal goals.

Watch RISR video on how to use business insights to engage

5. Convert insights into planning

Transition naturally into wealth, risk, exit, and tax planning conversations to show owners It shows how business clarity drives personal financial strategy.

SECTION 2

Client Outreach Template

Inviting a client to begin a valuation can feel intimidating if you don't have the right words. This section provides a proven, ready-to-send email that clearly communicates why the process matters and what clients will gain from it. It's designed to remove friction, set expectations, and make it easy for owners to say yes, whether you're reaching out proactively or following up on a planning conversation.

Email template: use for first outreach or to follow up after a planning review

Subject: {{Client business name}}

Hi [Name],

To complete your financial plan, we need better clarity into one of your most important assets: your business.

We have a simple process that surfaces key insights like:

- Current business value
- What it needs to be worth for your retirement or exit goals
- Key risks affecting value and opportunities to strengthen your plan
- Succession and exit options that align with your personal goals

We can complete the intake together in about 10–15 minutes. Would [Day/Time] or [Day/Time] work better?

Looking forward to helping you with this.

What this means and why it matters

You're showing the client that valuation is part of real financial planning, not extra work. This reduces hesitation, increases acceptance rates, and gets the process moving faster.

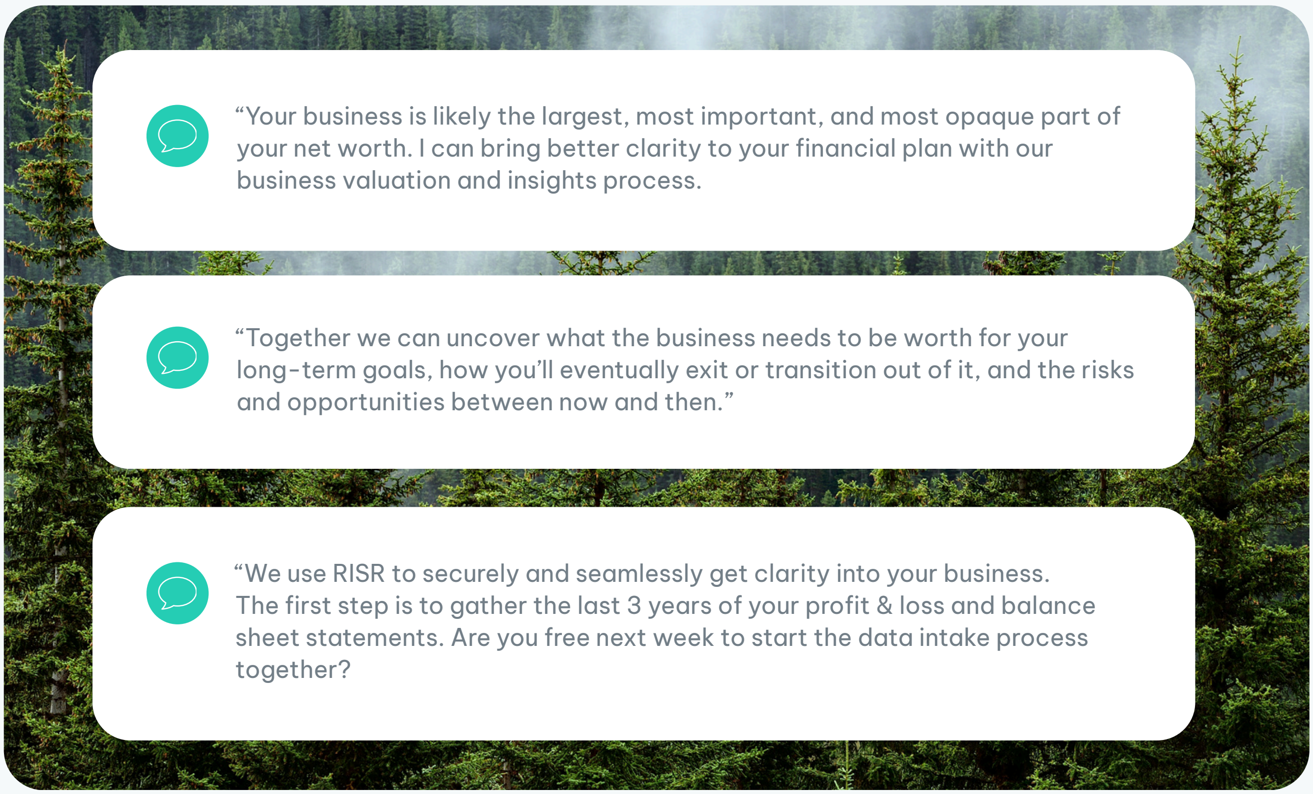
Need more examples?
See our marketing email templates and client-facing materials

SECTION 3

“Why This Matters” Script

Advisors often know a business owner’s largest planning blind spot long before the client does. Owners make decisions daily that impact their financial future, yet they rarely stop to assess what the business is worth or how it supports their long-term goals. This section gives you a clear, confidence-building script to explain why valuation and business insights matter, and how they complete the financial planning picture in a way clients instantly understand.

Script : A simple and powerful way to frame the conversation



“Your business is likely the largest, most important, and most opaque part of your net worth. I can bring better clarity to your financial plan with our business valuation and insights process.

“Together we can uncover what the business needs to be worth for your long-term goals, how you’ll eventually exit or transition out of it, and the risks and opportunities between now and then.”

“We use RISR to securely and seamlessly get clarity into your business. The first step is to gather the last 3 years of your profit & loss and balance sheet statements. Are you free next week to start the data intake process together?

What this means and why it matters

This framing positions you as the advisor who brings clarity to the owner’s most consequential asset. It helps the owner immediately understand why valuation is not optional, reduces hesitation around the process, and sets up deeper planning conversations that naturally follow once clarity exists.

SECTION 4

Positioning Yourself to COIs

Centers of influence are essential partners when working with business owners, but many advisors struggle with how to position themselves without sounding transactional. This section outlines how to introduce your value to CPAs, attorneys, and consultants in a way that strengthens collaboration and elevates their work. These talking points help you demonstrate how clarity around business value enhances the guidance COIs already provide, making you a resource, not another referral request.

Set up: clearly explain how you support owners in areas COIs already care about

"Our new business insights capabilities help owners by:

- Estimating what their business is worth today
- Identify risks and operational pressure points they may not see
- Showing what the business needs to be worth to achieve their retirement or exit goals
- Highlighting succession and exit plan options that align with their personal goals"

"This gives your clients clarity on their largest asset and naturally leads into deeper tax, legal, and planning conversations—making your work even more valuable."

"Please find an overview of our new business insights capabilities attached"

Add your logo to this one pager and summary video to share with COIs

What this means and why it matters

This positions you as a partner who strengthens the COI's relationships and elevates their work. It builds trust quickly, makes collaboration easier, and naturally increases the likelihood they'll introduce you to business-owner clients because the value is so clear.

SECTION 5

Integrating RISR Into Your Workflow

RISR isn't just a planning tool; it's a conversation engine that helps you get in front of more business owners and the COIs who influence them. When woven into your daily and weekly workflow, RISR gives you a simple way to identify who to approach, what to say, and how to follow up with meaningful insight. This section outlines the key touchpoints where RISR supports your outreach efforts so you can consistently start conversations, deepen relationships, and create more opportunities to work with owners.

Discovery

- Identify business owners already in your book
- Listen for other owners mentioned in meetings with current clients (ex: "my client", "my colleague", "my partner owns a business")
- Show your capability to deliver clarity seamlessly
- Ask satisfied clients for referrals to owners similar to them
- Use RISR examples and insights to position your expertise with those referrals

COI Engagement

- Lead with clarity: "Here's the insight I can bring to your clients"
- Show COIs how quickly you can surface valuation, risk, and planning gaps
- Offer to support their conversations with owners they already work with
- Use Business Insights or valuation summaries as value-forward conversation starters

Owner Outreach

- Use valuation examples, risk insights, and planning workflows to warm up outreach
- Begin with simple, curiosity-driven prompts ("Owners typically ask..." / "Here's what we often uncover...")
- Position the 15-minute intake as a low-lift starting point
- Reinforce that clarity on the business is the missing piece in their planning

You don’t need to reinvent your practice to work more deeply with business owners. Start the conversation, RISR insights and deliverables will help you take it from there.

Business owners want clarity, confidence, and direction — and advisors are uniquely positioned to give it to them. When you combine your planning expertise with RISR’s business insights, you create conversations that owners rarely experience: conversations anchored in their goals, supported by data, and focused on what truly matters most to them.

The scripts, workflows, and positioning tools in this playbook are designed to help you start those conversations with ease. Whether you’re meeting with an owner for the first time, re-engaging a past client, or building relationships with COIs, leading with insight creates momentum and opens the door to deeper planning opportunities.

RISR gives you the visibility to guide owners across wealth, risk, exit, and tax planning — and it empowers you to show how their business fits into their life plan with clarity and simplicity. When used consistently, it becomes the foundation for a stronger advisory relationship and a more confident path forward for your clients.