How to Drive Organic Growth: Insights from FINNY

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Key Takeaways

- Eden Ovadia, CEO of FINNY, joined WisdomTree's *Office Hours* to share actionable insights for advisors.
- Firms with clear value propositions and strong online presences stand out in competitive markets, boosting client acquisition through targeted outreach and referrals.
- Advisors allocating at least 3% of revenue to marketing often double their growth compared to industry averages, emphasizing meaningful client engagement over sheer volume.
- AI-powered platforms like FINNY help advisors streamline prospecting by automating lead generation and outreach, allowing more time for relationship-building and client service.

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Organic growth isn't easy. Whether prospecting, chasing referrals or standing out, success takes strategy. That's why Eden Ovadia, CEO of FINNY, joined WisdomTree's *Office Hours* to share actionable insights on driving growth, leveraging technology and avoiding pitfalls.

Here's what she had to say about how advisors like you can win in 2025.

Growth: The Good, the Bad and the Reality

Eden opened with a look at industry growth trends. On the surface, 2023's 18.2% average AUM growth looks strong. But here's the catch: over half of that came from market performance, not new clients. Strip that away, and growth from net new clients was closer to 7%.[1]

Even more striking? Over 62% of firms grew by less than 5%, while a smaller group achieved growth rates of 20% or more.[1] These standout firms didn't just get lucky—they used targeted strategies and innovative tools to differentiate themselves.

The takeaway? Organic growth is possible, but it won't happen without a plan—and the right tools.

Key Strategies to Win at Organic Growth

1. Differentiation Is Essential

Standing out in a crowded market is essential. A unique value proposition and strong online presence help prospects see why they should choose you. Eden explained, "A clear value proposition doesn't just help with cold outreach; it's critical for every growth channel, including referrals."

Without meaningful online information, even referred prospects might pass you over. Make sure your brand is compelling and easy to find.

2. Invest in Marketing

Marketing isn't just an expense—it's an investment. Firms spending 3% or more of revenue on marketing—compared to the 1.5% industry average—often see double the growth.[1] Eden noted, "It's not just about volume; it's about building meaningful connections and standing out in a crowded market."

Align your marketing efforts with your value proposition and client needs to expand your reach, build trust and create lasting connections that fuel long-term success.

3. Focus on Affluent Clients

Clients with $500,000 to $1 million in assets often strike the right balance between growth potential and service costs. Eden explained, "These clients present an efficient growth opportunity, especially if you can deliver value during the onboarding phase." They require less ongoing service than ultra-high-net-worth clients, making them a profitable segment to target.

Avoiding Common Pitfalls

While identifying strategies for success, Eden also outlined critical missteps that advisors should avoid:

- **Being undifferentiated:** Generic advisors rarely thrive. Build a personal brand that resonates with your target clients.
- **Chasing bigger clients:** Ultra-high-net-worth clients may seem appealing but often result in slower growth, higher servicing costs and lower margins.
- **Relying solely on referrals:** While referrals remain powerful, they can't be your only strategy. Diversify your client acquisition efforts to stay competitive.

How AI Can Help You Grow Smarter

If you're overwhelmed by the day-to-day grind of prospecting, FINNY might be the solution you need. This AI-powered platform streamlines client acquisition by identifying high-potential leads, enriching data and automating outreach. It handles everything up to the first meeting, freeing you to focus on building relationships.

Eden shared a success story about Nick, a 29-year-old advisor targeting tech executives. Using FINNY, Nick went from booking one meeting every 6–8 weeks to securing one qualified prospect meeting every week. His secret? A laser-focused niche and consistent, value-driven outreach.

Looking Ahead: Winning in 2025

With organic growth being a persistent challenge, advisors must adopt a multi-channel approach to client acquisition. Blend traditional methods like COI (centers of influence) relationships with digital marketing and AI-driven tools to maximize your reach.

“Growth isn’t about choosing between COIs and cold outreach—it’s about leveraging every channel effectively,” Eden said. By combining targeted marketing, differentiated branding and innovative technology like FINNY, advisors can position themselves for sustained success.

Ready to Level Up?

If organic growth feels challenging, now’s the time to rethink your approach. Ask yourself:

- Is my value proposition clear and compelling?
- Does my online presence support client acquisition?
- Am I using tools to streamline repetitive tasks?

With the right strategies and tools, you can stand out, win more clients and grow your practice sustainably. Let’s make 2025 your best year yet.

Explore how WisdomTree’s ***Advisor Solutions platform*** and FINNY can help you thrive.

For those interested in attending other *Office Hours*, check out the latest schedule here.

[1] True Ensemble TM Data Insights 2024 Survey