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Is your firm setting the trends transforming financial services or simply reacting to them?

Get the insight you need to navigate in uncharted waters.

Matt Lynch and other members of the Strategy & Resources team are frequent presenters at industry conferences and company events.

With experience as a CEO, CFO and board member, Mr. Lynch is called upon to help executive teams and elite advisor groups understand what matters most in the financial services industry.

Past engagements include: FPA Major Firms Symposium, NAPFA events, FSI and broker-dealer conferences. Mr. Lynch is open to speaking invitations if your organization is interested in bringing his expertise and insights to a board meeting, conference or executive retreat.

PRESENTATION TOPICS

- *Trends That Matter in the Financial Services Industry – Discerning the “Interesting and Irrelevant” from the “Important and Disruptive”.*

Consumer preferences, competitive threats, and compliance and regulatory noise are just three of the driving forces impacting independent financial advisors and the firms that support them. Right now, Mr. Lynch and his team count five times. The three main drivers at this time are consumer preferences, competitive threats, and compliance/regulatory noise. Once you consider the drivers and trends, then you can decide whether it's just a passing fad, a trend you can beat, or a systemic change you can't ignore.

Mr. Lynch has also developed a scoring grid to help firms clearly see how to contrast “interesting and irrelevant” elements with “important and disruptive” trends.





PRESENTATION TOPICS

- *Successful Transitions: Getting It Right – Developing a Strategy for the Future*

We are experiencing a significant graying of the profession and many advisers are considering exit plans. Firms can help them work through the process. There are six phases in any business; each is an opportunity for the business owner to evaluate the current situation and develop a strategy for moving forward. Mr. Lynch and his resource partners bring a fresh perspective to this industry challenge. Another option to consider: work with Strategy & Resources to develop an “advisor to owner” program that will help the next generation move into a more entrepreneurial / leadership role with phased support over time.

- *Why Firms Pay for Unneeded Services – Dissecting the Vendor Services Maze*

Nobody wants to get a bill for services they didn't need or really know they were purchasing. But that's what's happening – unwittingly – to advisors and firms as the vendors that supply them expand their service offerings and create redundancies. Mr. Lynch and his consulting partners can help your executive team think through the issues and chart a plausible path to remedy the situation.

- *The Service Value Equation – How Leadership and Value Intertwine*

The reality is that we don't enhance value by improving service, although that is the default for many firms. Value is more closely linked to the offer and the relationship; it's connected to leadership. Mr. Lynch and his senior consulting team can explain the leadership / value relationship and help your audience and/or team understand an array of important dynamics.



Strategy and Resources, LLC, is proud to work with leaders in the financial services industry, including insurance firms, investment banks, broker-dealers, registered investment advisors and asset managers.

Our real world executive experience means no double talk or consultant speak – just pragmatic actionable advice. Let us bring a refreshing change to your next board meeting, conference or executive retreat.

To explore options and opportunities, contact us at:

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