

# Financial Planning

PRACTICE AND CLIENT MANAGEMENT

## Expanded offerings draw prospects, advisors say

By **Rob Burgess** January 22, 2025, 3:26 p.m. EST 8 Min Read



In years past, advisors who offered expanded services were primarily found in family offices, where ultrahigh net worth clients had access to a robust suite of often personalized concierge options.

Over time, clients across income levels have come to expect more family office-style services beyond basic financial planning or investment management from their advisors.

Advisors who have answered this call by including other services such as estate planning, equity compensation consulting and more say that clients appreciate these additions — and that more prospects have followed as a result.

### Engage outside professionals where it makes sense

Clients have asked for help with everything from finding a real estate appraiser to choosing P&C insurance, said Rick Simonetti, CEO, head of wealth planning and founding partner at [Fidelis Capital Partners](#) in Tampa, Florida.

"Our clients tell us we have exceeded their lofty expectations with our ability to take on broader needs," he said. "Many of them have introduced us to friends and family."