

Capitaliz

FOR WEALTH ADVISORS

SUCCESS STORY

IDENTIFY GAPS. DRIVE VALUE. EXECUTE WITH CONFIDENCE.

STRATEGIC DIFFERENTIATION IN WEALTH MANAGEMENT

Overview

Taylor successfully integrated Capitaliz into his practice to enhance business planning, valuation strategies, and assess exit readiness with business owner clients. Operating in a competitive market of wealth advisors in Florida, **Taylor differentiates his services using Capitaliz** to drive client success and revenue growth for his firm, Southern Capital Business Consulting.

Consulting with Confidence

Through extensive experience and knowledge gained through the CEPA™ program, Taylor combines personal financial planning tools and the Capitaliz platform to best support small business owners.

Taylor employs Capitaliz to:

- Spark “triggering event” discussions using deep analysis from Business Insights Reports about value potential, SWOT, profit gaps, and more.
- Identify risks such as owner dependency, customer concentration, and process deficiencies.
- Emphasize proactive due-diligence to prevent buyer-initiated price discounts.
- Demonstrate the impact of improvements on business valuation over time through implementation.
- Facilitate long-term engagements from clients eager to act on proven planning recommendations.

Business Engagement Structure

Phase 1: Audit & Analysis

Includes a comprehensive assessment of the owner’s personal financial goals, as well as a deep-dive analysis of valuation, value potential, risks, and more using the Capitaliz Business Insights Report.

Phase 2: Implementation & Ongoing Engagement

Phase 1 clients can opt to retain Southern Capital for plan management and consulting. Fees vary based on complexity to allow for tailored support and alignment.

Of the executed Phase 1 cases thus far, almost all clients have transitioned to long-term, Phase 2 planning engagements.

Return on Investment & Beyond:

Using Capitaliz in practice has produced three key benefits driving ROI:

1. Strategic practice differentiation that sets Southern Capital apart from competitors.
2. In-depth analysis to drive impactful planning conversations and validated advice.
3. Won AUM from current consulting clients, projecting a similar trend of increased AUM based on Taylor’s growing book of business.

Book some time with our team at capitaliz.com/get-started to see how Capitaliz can help you differentiate and boost long-term engagements.



TAYLOR HODGES



SOUTHERN CAPITAL

Founder, Southern Capital

- Certified Exit Planning Advisor (CEPA™)
- Certified Financial Planner (CFP)

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“The Capitaliz Platform, specifically the **Business Insights Report**, guides the strategic planning approach at Southern Capital. This approach has helped differentiate our firm, develop long-term engagements, and deliver exceptional planning solutions that drive AUM.”



Capitaliz IMPACT:

Wealth Advisors using Capitaliz can:

- Differentiate service offerings in a competitive advisor market.
- Scale business with a platform that supports revenue growth, client retention, and AUM.
- Leverage analysis from the Business Insights Report to align wealth goals, mitigate risks, and close gaps.