Centricity
Together Forward

THE 2026 CLIENT ACQUISITION PLAYBOOK

Your Network
Is Your Net Worth.

POWERED BY
CENTRICITY WEALTHTECH

Centricity
Together Forward

CONTENTS

“The best wealth is built not just in markets, but in relationships.”

PART 3

WHY THIS PLAYBOOK EXISTS

Every Financial Product Distributor starts with the same challenge.

> “How do I get my next client?”

Not my next product.
Not my next transaction.
My next client.

This playbook is designed to change that. Inside, you'll find proven client acquisition strategies, practical scripts, referral frameworks, visibility tactics, meeting structures, and growth systems that can help you build your first 100 client relationships.

REALITY CHECK

Most FPDs spend years improving product knowledge, very few spend time building a clean acquisition system.

STRONG ADVISORS OFTEN STRUGGLE TO GROW, while average advisors with better systems scale.

QUESTION

If someone asked you where your next five clients will come from,

would you have a clear answer?

PART 4

INDIA'S BIGGEST INVESTOR OPPORTUNITY HAS JUST BEGUN.

India is witnessing one of the largest wealth creation opportunities in history.

Wealth Creation Wave is Here

India's investor base is expected to grow from ~10 Cr today to over

30 Cr

by 2030.

KEY DRIVERS FUELING THIS OPPORTUNITY

- Rising Incomes
- Financial Awareness
- Digital Adoption
- Market Participation
- Young Demographics

Yet, despite increasing awareness, millions of Indians still remain underserved when it comes to financial guidance.

This gap represents one of the biggest opportunities available to Financial Product Distributors today.

THE NUMBERS TELL THE STORY

142 Cr Population	**136 Cr** Aadhaar Holders	**95 Cr** Insurance Holders	**90 Cr** Bank Account Holders
61 Cr Taxpayers	**8 Cr** Mutual Fund Investors	**40+** Unicorns	**Top 3** Global Startup Ecosystem

KEY MESSAGE

India doesn't have an investor shortage.
India has a **guidance shortage.**

You don't just sell products.
You guide lives toward financial freedom.

PART 5

WHY MOST FPDs STRUGGLE TO GROW

Most Financial Product Distributors do not fail.
They plateau.

The first few clients come naturally.
Then growth slows down.

Not because opportunity disappears.
But because systems are missing.

COMMON GROWTH BARRIERS

- No acquisition system
- Weak follow-up
- No referral process
- Limited visibility
- Product-first conversations
- Lack of specialization
- No growth plan

THE HIDDEN GROWTH TRAP

Many advisors believe growth problems can be solved through more products.

In reality, most growth problems are pipeline problems.

NO PIPELINE → NO MEETINGS → NO CLIENTS → NO GROWTH

KEY TAKEAWAY

Growth problems are rarely product problems. They are process problems.

The advisors who scale don't chase more products. They build better systems.

> "Growth doesn't happen by chance. *It happens by design.*"

PART 6

THE 100 CLIENT BLUEPRINT

Reaching 100 clients is not about working harder. It is about progressing through stages.

STAGE 4
50–100 CLIENTS
Focus: Systems

STAGE 3
25–50 CLIENTS
Focus: Visibility

STAGE 2
10–25 CLIENTS
Focus: Referrals

STAGE 1
0–10 CLIENTS
Focus: Trust

ADVISOR INSIGHT

The activities that help you acquire your first 10 clients are very different from the activities required to reach 100.

Most advisors get stuck because they continue using Stage 1 strategies at Stage 4.

Successful advisors don't jump stages. They build, systemize, and scale deliberately.

Focus on building the right foundations at every stage.

STRATEGY #1

Investor Awareness Sessions

Teach First. Clients Follow.

Investors trust educators more than salespeople.

Host small educational sessions around topics that matter to investors. Educate without selling, and trust naturally leads to long-term relationships.

TOPICS THAT ATTRACT INVESTORS

- SIP Investing
- Retirement Planning
- Tax Saving
- Child Education Planning
- Importance of Asset Allocation
- Multi Asset Portfolio
- Importance of Alternates
- Mapping of SLR (Safety, Liquidity, Risk)
- Financial Planning & Goal Review

> *People rarely invest after the first interaction. But they often remember the advisor who helped them understand something valuable.*

EVENT STRUCTURE

10 MIN	Welcome
20 MIN	Financial Topic
15 MIN	Q&A
15 MIN	Portfolio Review Registration

EXPECTED OUTCOME

- 20 Attendees
- 5 Qualified Leads
- 2 Portfolio Reviews
- 2 New Clients

STRATEGY #2

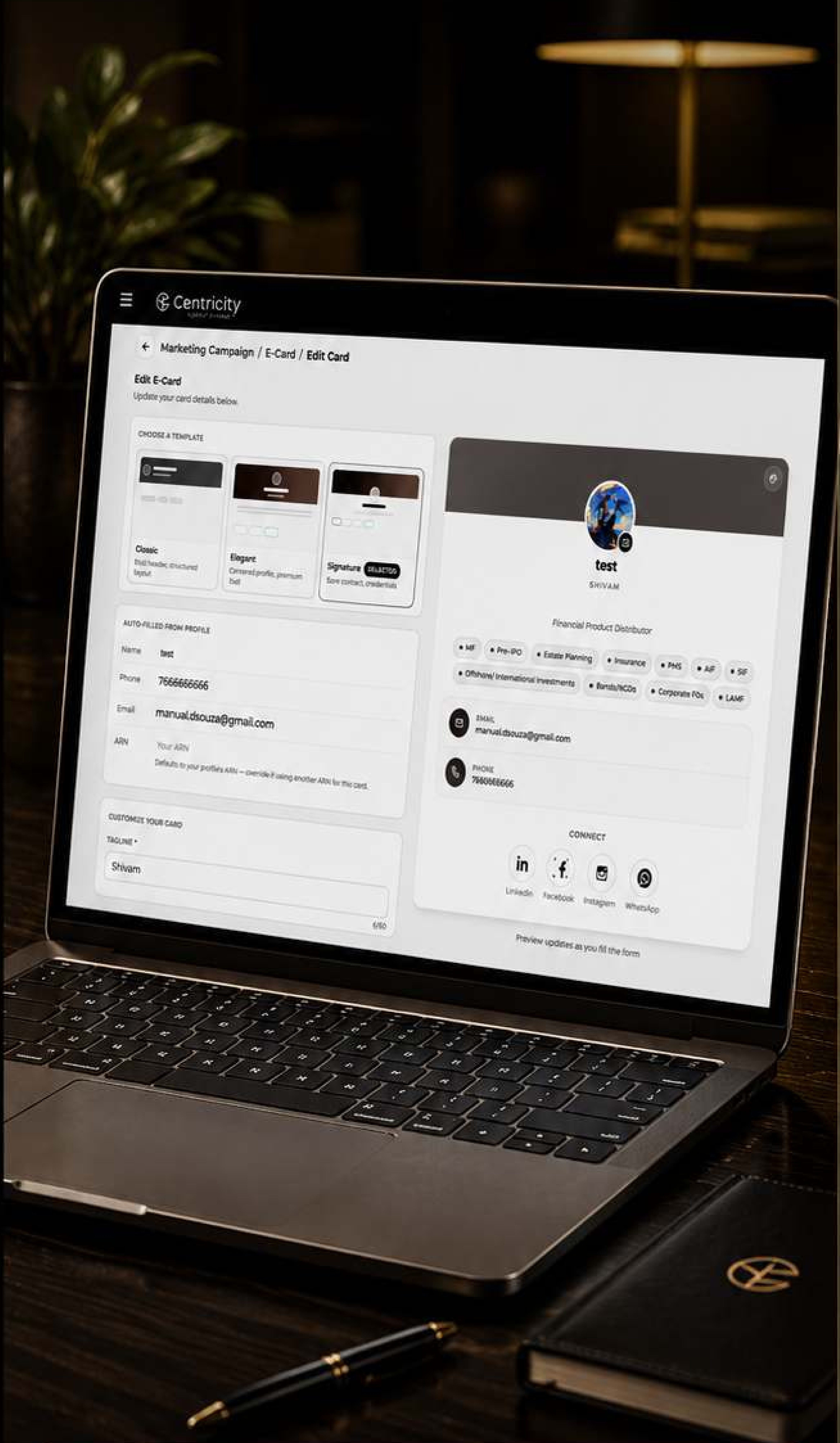
E-CARD

Your Professional Identity. Ready to Share.

Create a personalized digital business card and share your professional identity instantly. Make every connection count.

CREATE YOUR E-CARD

- Choose a premium template
- Personalize your profile
- Add products & credentials
- Connect your social profiles
- Share instantly via link or QR



WHY IT MATTERS

- ✓ Creates a strong first impression
- ✓ Builds credibility instantly
- ✓ Easy to share across WhatsApp, email and social media
- ✓ Keeps your contact information always accessible

CREATE | PERSONALIZE | SHARE | CONNECT

STRATEGY #3

CA & PROFESSIONAL ALLIANCES

Build relationships with trusted professionals who influence financial decisions.

WHO TO CONNECT WITH

- Chartered Accountants
- Tax Consultants
- Lawyers
- Insurance Professionals

CONVERSATION STARTER

> "Many of my clients seek trusted professionals for tax and legal advice. I'd love to explore ways we can create value for each other's clients."

GOAL

Build 3 strategic alliances every quarter.

> *"Strong alliances expand your reach. Better alliances create real impact."*

STRATEGY #4

FESTIVAL & EVENT BASED CAMPAIGNS

Investors are more receptive during key financial moments.

Use MarCom to stay visible with timely, relevant investor communication.

USE MARCOM CAMPAIGN OPPORTUNITIES FOR

- Birthday Wishes
- Festive Wishes
- Knowledge Base
- Product wise collaterals
- Social Media Banners
- WhatsApp Template

CREATE | PERSONALIZE | DISTRIBUTE

STRATEGY #5

THE ₹1,000 SIP CHALLENGE

A simple campaign.

Ask prospects:

"Can you commit ₹1,000 every month towards your future?"

WHY IT WORKS

- Low entry barrier
- Creates investing habits
- Builds future AUM
- Reduces hesitation

> Many advisors wait for large investors.
> *Successful advisors build relationships early and grow with their clients.*

Small commitments create lifelong investors.

The ₹1,000 SIP is rarely about the amount.
It's about helping investors take the first step.

STRATEGY #6

WHATSAPP BROADCAST ENGINE

Stay visible. Stay relevant. Stay remembered.

Don't sell every day.
Become the advisor your clients hear from every week.

SAMPLE BROADCAST

> "Market volatility is temporary. Discipline is permanent.
>
> Stay focused on your long-term goals.
>
> CENTRICITY WEALTHTECH

WHATSAPP BROADCAST TEMPLATE

Hi {First Name},
Hope you're doing well!
Here's your weekly {Key Insight / Tip} to help you stay on track towards your financial goals.
10:30 AM

{Main Message}
(Market Insight / Education / Wealth Tip)
Consistency today, creates freedom tomorrow.
10:30 AM

Key insight / Tip:
{Add your key takeaway or value point}
Stay disciplined. Stay invested. Stay ahead.
10:30 AM

Let's build wealth, together!
– Centricity WealthTech
We're here to help you every step of the way.
10:30 AM

KEY MESSAGE

Stay visible without selling.

> "Investors don't remember the advisor who called once.
> They remember the advisor who educated them every week.

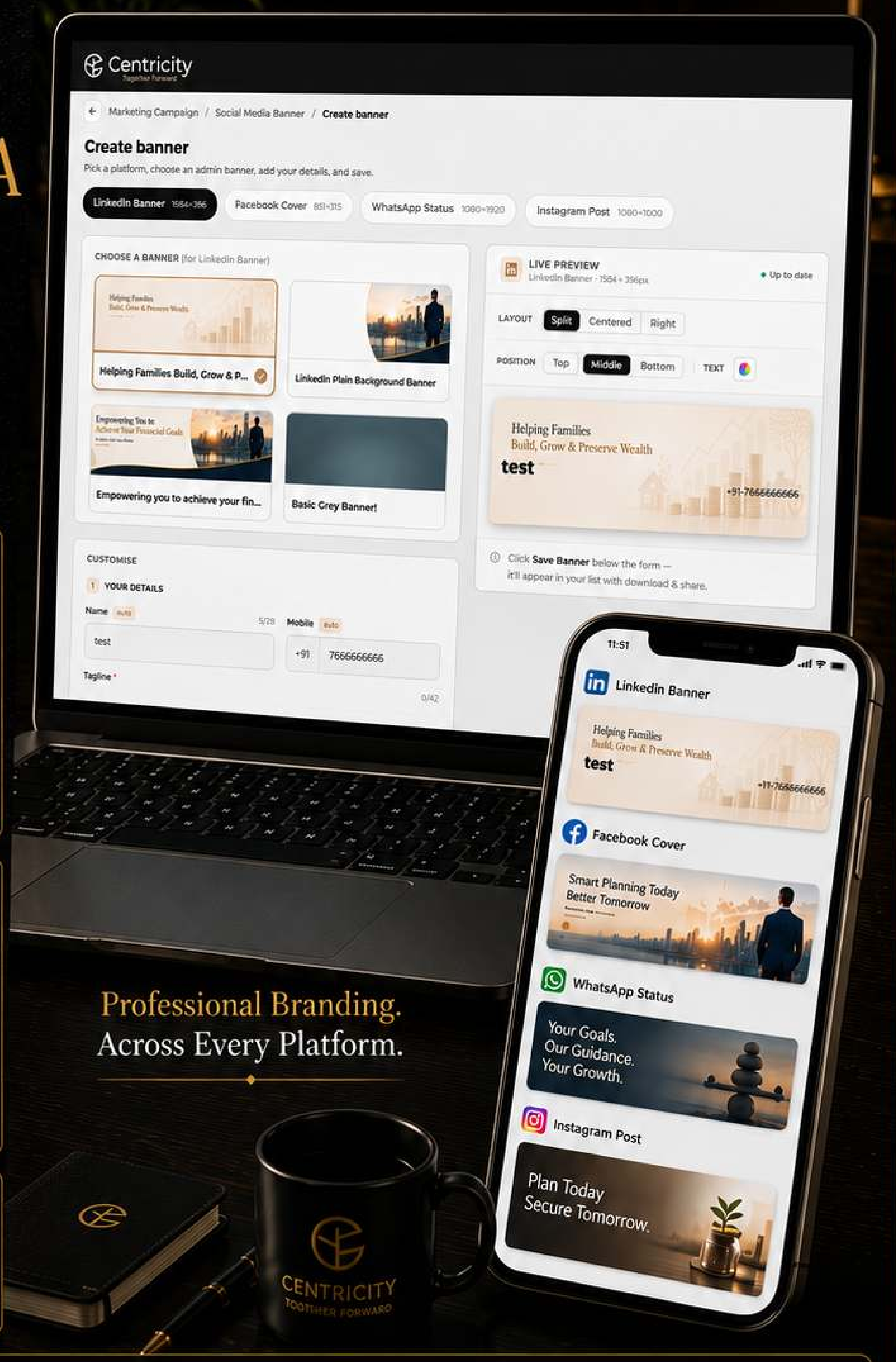
DIGITAL GROWTH ENGINE

STRATEGY #7

MARCOM SOCIAL MEDIA BANNERS

One Design. Multiple Platforms.

Stay visible with professionally designed banners personalized for your brand.



WHY IT MATTERS

Investors often discover you online before they contact you.

Consistent branding across every platform builds trust, strengthens credibility, and keeps you memorable.

AVAILABLE BANNER FORMATS

- LinkedIn Banner
- Facebook Cover
- WhatsApp Status
- Instagram Post

KEY BENEFIT

Create once.
Personalize instantly.
Publish everywhere.

1. **SELECT TEMPLATE** — Choose from professionally designed banners.
2. **CUSTOMIZE** — Add your details, logo & personalize.
3. **DOWNLOAD** — Preview and download your banner.
4. **PUBLISH** — Share across LinkedIn, Facebook, WhatsApp & Instagram.

STRATEGY #8

GOOGLE BUSINESS PROFILE

One of the most ignored trust-building tools.

CHECKLIST

- CREATE PROFILE
- ADD SERVICES
- UPLOAD PHOTOS
- COLLECT REVIEWS
- POST UPDATES

INCREASE VISIBILITY
Appear in local search results.

BUILD TRUST
Show professionalism before the first conversation.

ATTRACT QUALITY LEADS
Right people find you at the right time.

DRIVE REAL GROWTH
More visibility. More trust. More clients.

KEY MESSAGE

> Reviews create credibility before conversations begin.

STRATEGY #9

PORTFOLIO HEALTH CHECK CAMPAIGN

One of the strongest lead magnets.

OFFER

- FREE PORTFOLIO REVIEW
- FREE ASSET ALLOCATION CHECK
- PORTFOLIO RISK ASSESSMENT

USE CENTRICITY TOOLS

PORTFOLIO SCANNER

Instant overview of your portfolio health.

ASSET ALLOCATION INSIGHTS

Understand your allocation and diversification.

RESEARCH SUPPORT

Make informed decisions with expert research.

Personalised for You.
Actionable for Your Goals.

KEY MESSAGE

> People may ignore a sales pitch.
> They rarely ignore personalised insights.

STRATEGY #10

WHATSAPP STATUS MARKETING

Your WhatsApp Status is a mini billboard.

CONTENT IDEAS

- **SIP CALCULATOR** — Plan today for a better tomorrow.
- **TAX SAVING TIPS** — Save tax smartly, build wealth wisely.
- **RETIREMENT PLANNING** — Retire early, Retire happily.
- **MARKET UPDATES** — Stay informed. Stay ahead.
- **WEALTH QUOTES** — Inspiration today, Motivation always.
- **GOAL PLANNING** — Goals give direction. Planning brings success.

EXAMPLES OF POWERFUL STATUS UPDATES

PRO TIP | *Consistency beats creativity.* | ONE USEFUL UPDATE EVERY DAY IS ENOUGH.

STRATEGY #11

CLIENT SUCCESS STORIES

People trust outcomes.
Not claims.

SHARE STORIES AROUND

- Goal Achievement
- Retirement Planning
- Disciplined Investing
- Financial Milestones
- Asset Allocation

NOTE

Focus on journeys, not returns.

Real stories create emotional connection.
Guidance builds confidence.
Discipline builds wealth.

BEFORE

"We want to secure our family's future."

- Investments scattered across products
- No asset allocation strategy
- No structured financial plan

THE JOURNEY

- GOAL SETTING
- ASSET ALLOCATION
- DISCIPLINED INVESTING
- REGULAR REVIEWS
- STAYED INVESTED

AFTER 4 YEARS

SUCCESS

Followed the Asset Allocation Strategy Rigorously

- Built a well-diversified portfolio
- Rebalanced investments periodically
- Stayed disciplined through market cycles
- Progressed steadily towards financial goals

"Prospects don't buy performance.
They buy stories they can see themselves in."

STRATEGY #12

THE 30-MINUTE WEALTH CONSULTATION

FRAMEWORK

10 MIN
GOALS

Understand the client's financial goals and priorities.

10 MIN
PORTFOLIO REVIEW

Review the portfolio using the Centricity Platform.

- Performance Matrix
- Compare Tool
- What-If Analysis
- Financial Planning Report

10 MIN
ACTION PLAN

Present clear recommendations and define the next steps.

PORTFOLIO REVIEW THROUGH CENTRICITY PLATFORM

- PERFORMANCE MATRIX
- COMPARE TOOL
- WHAT-IF ANALYSIS
- FINANCIAL PLANNING REPORT

Generate data-driven insights and personalized recommendations in minutes.

> "The objective of the first meeting is *not to close a transaction.*
> The objective is to *earn the second meeting.*"

STRATEGY #13

COMMUNITY BUILDING

PARTICIPATE IN:

RWAs
Connect. Contribute. Build trust locally.

BUSINESS ASSOCIATIONS
Engage with like-minded business owners.

PROFESSIONAL COMMUNITIES
Learn, share and grow together.

PARENT NETWORKS
Build personal connections that last.

LOCAL CLUBS
Be present where your community comes together.

WHY IT WORKS

People prefer to do business with those they know and trust.

Relationships create opportunities.

HYBRID GROWTH ENGINE

STRATEGY #14

CENTRICITY RESEARCH REPORTS

Stay visible.
Stay relevant.
Stay remembered.

Investors remember advisors who consistently share valuable insights. Centricity Research Reports help you stay visible, build trust, and strengthen long-term relationships.

SUGGESTED SECTIONS

- Market Update & Investment Insight
- Tax Tip
- Client FAQ
- Upcoming Events
- Performance Matrix & Compare Tool
- What-if Analysis

CREATE | PERSONALIZE | DISTRIBUTE

YOUR FIRST

90-DAY GROWTH PLAN

MONTH 1
BUILD VISIBILITY
- LinkedIn
- Google Business
- WhatsApp Presence

MONTH 2
BUILD TRUST
- Discovery Meetings
- Portfolio Reviews
- Investor Sessions

MONTH 3
BUILD REFERRALS
- Introductions
- Testimonials
- Strategic Partnerships

KEY MESSAGE
Growth follows activity.

THE MODERN FPD ADVANTAGE

Ten years ago,
investors wanted products.
Today, they want solutions.

MODERN PRODUCT ECOSYSTEM

- Mutual Funds
- Insurance
- PMS
- AIFs
- Bonds
- Corporate FDs
- LAMF
- Pre-IPO Opportunities

KEY MESSAGE

Clients think in goals.
FPDs provide solutions.

Why Partners Choose Centricity

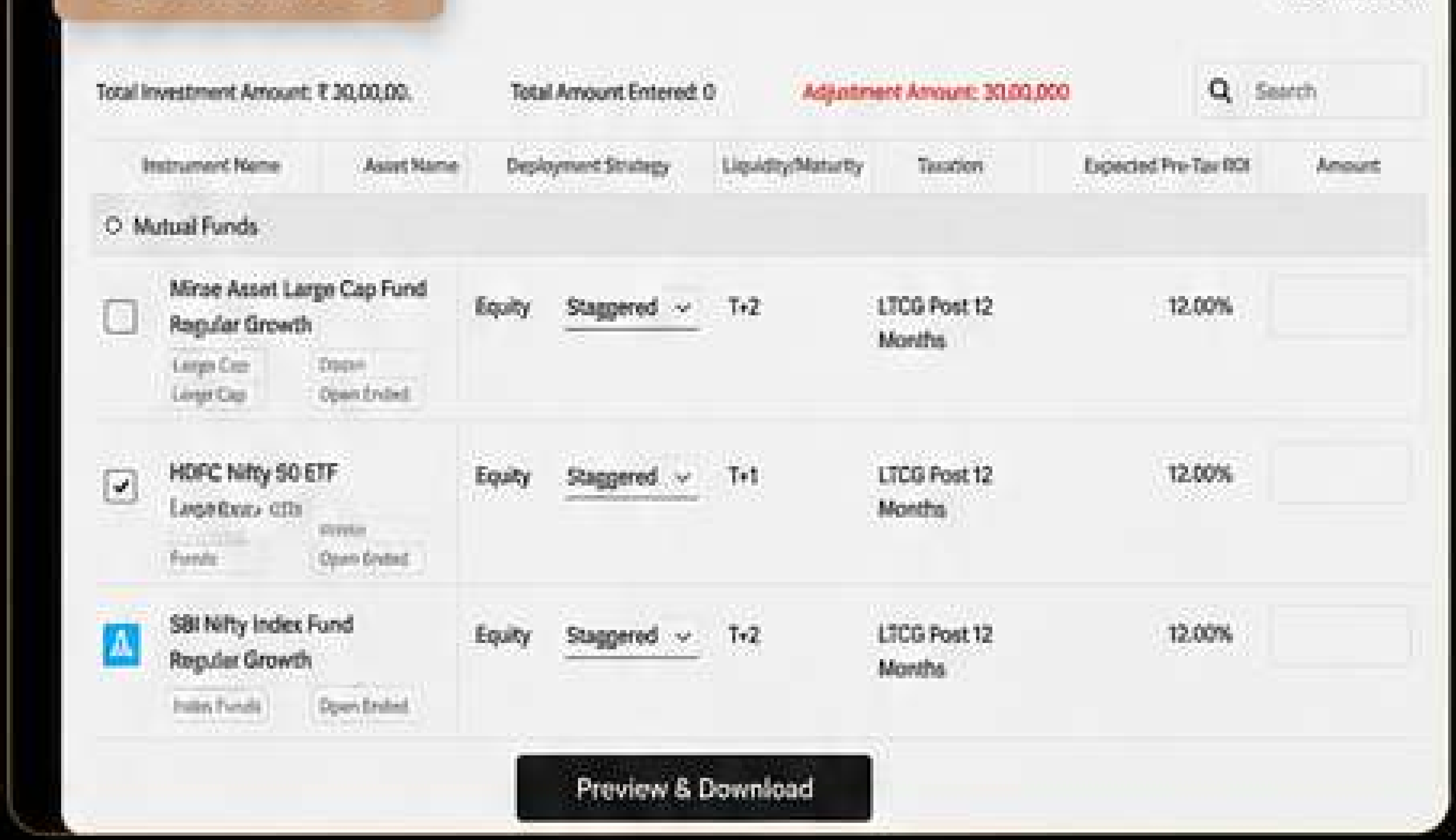
ONE ECOSYSTEM.
EVERYTHING YOU NEED.

Growth requires more than products.
It requires an ecosystem.

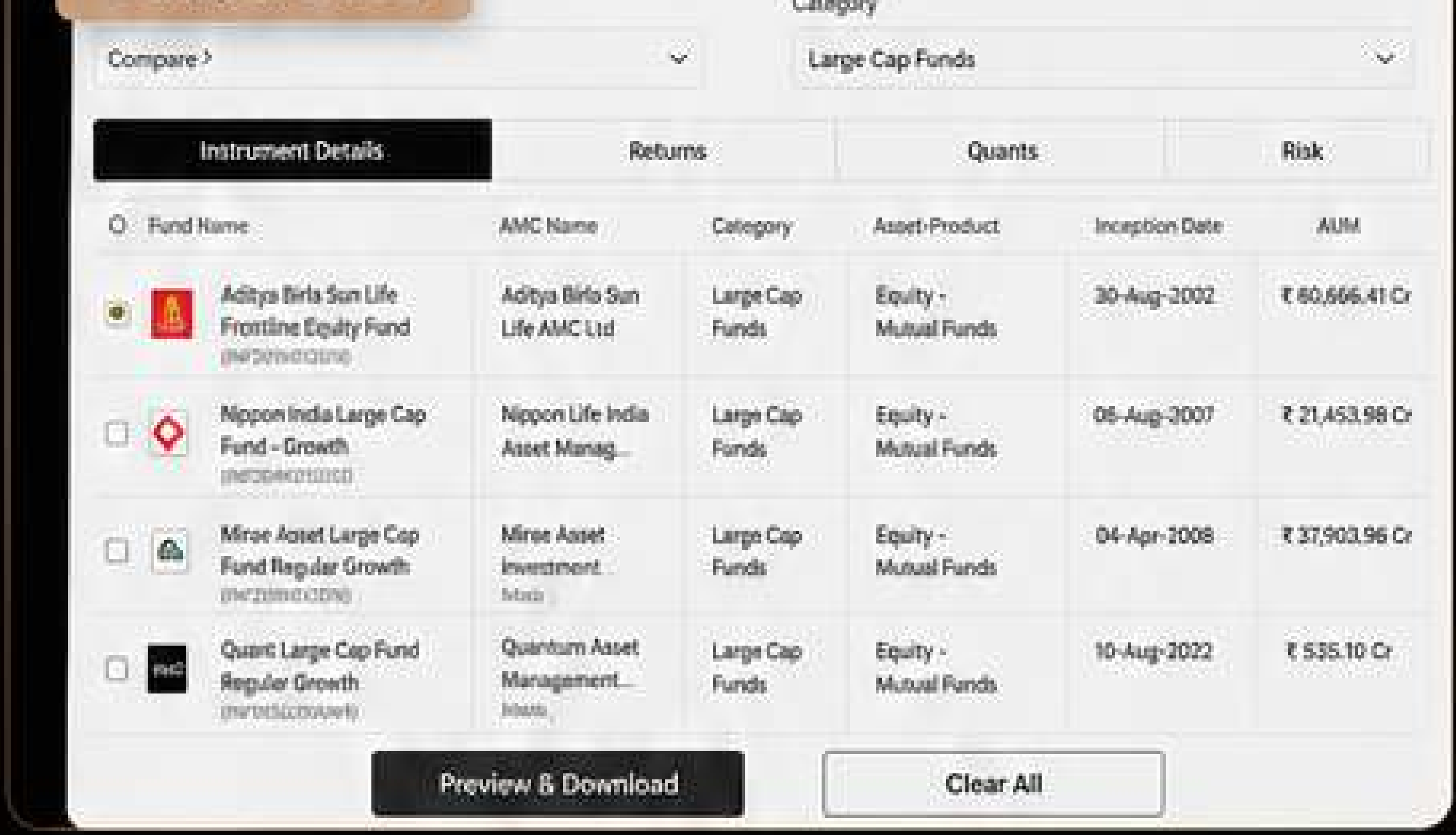
Technology that empowers advisors.
Support that strengthens relationships.

SMART TOOLS. STRONGER ADVISOR OUTCOMES.

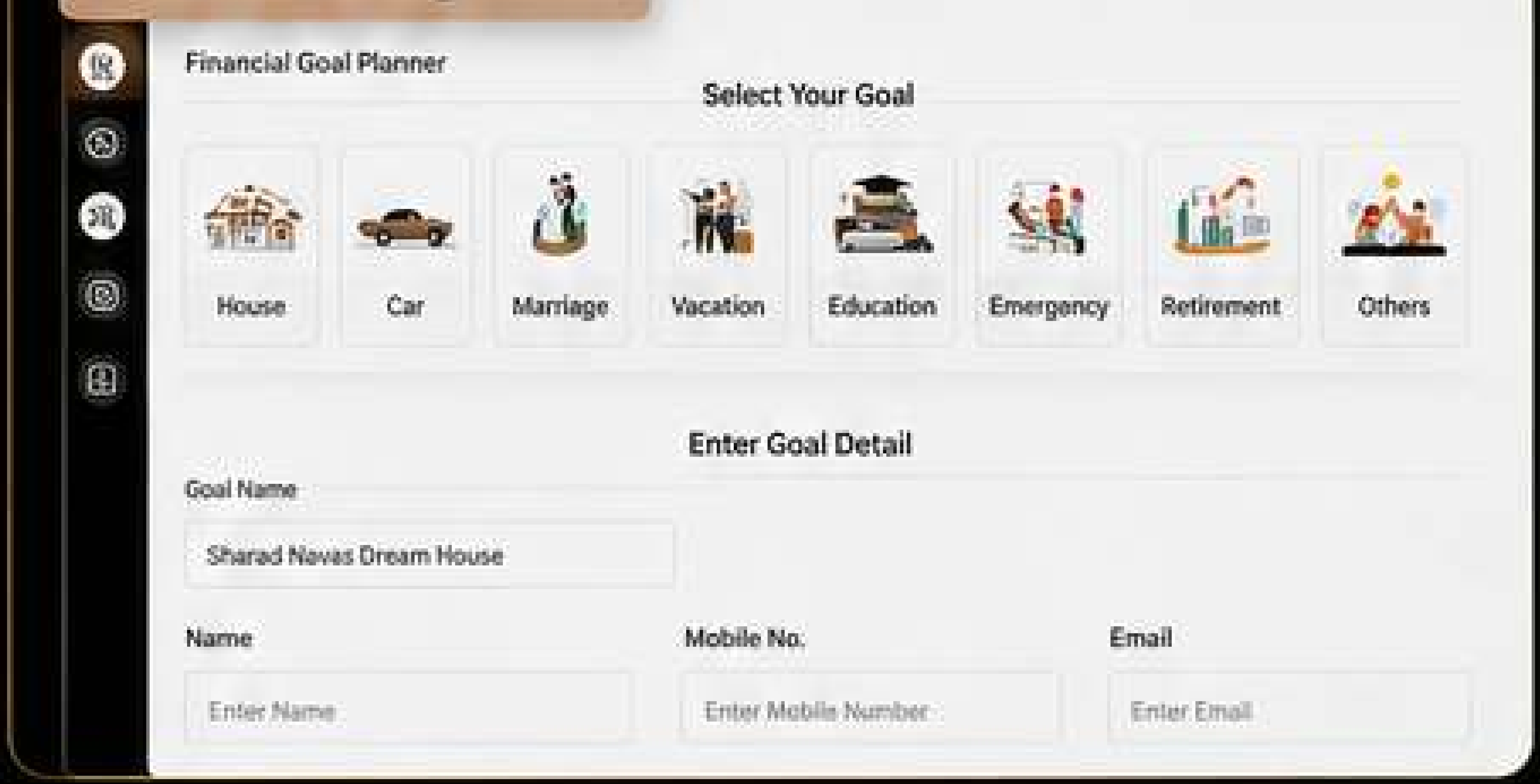
Quick Invest



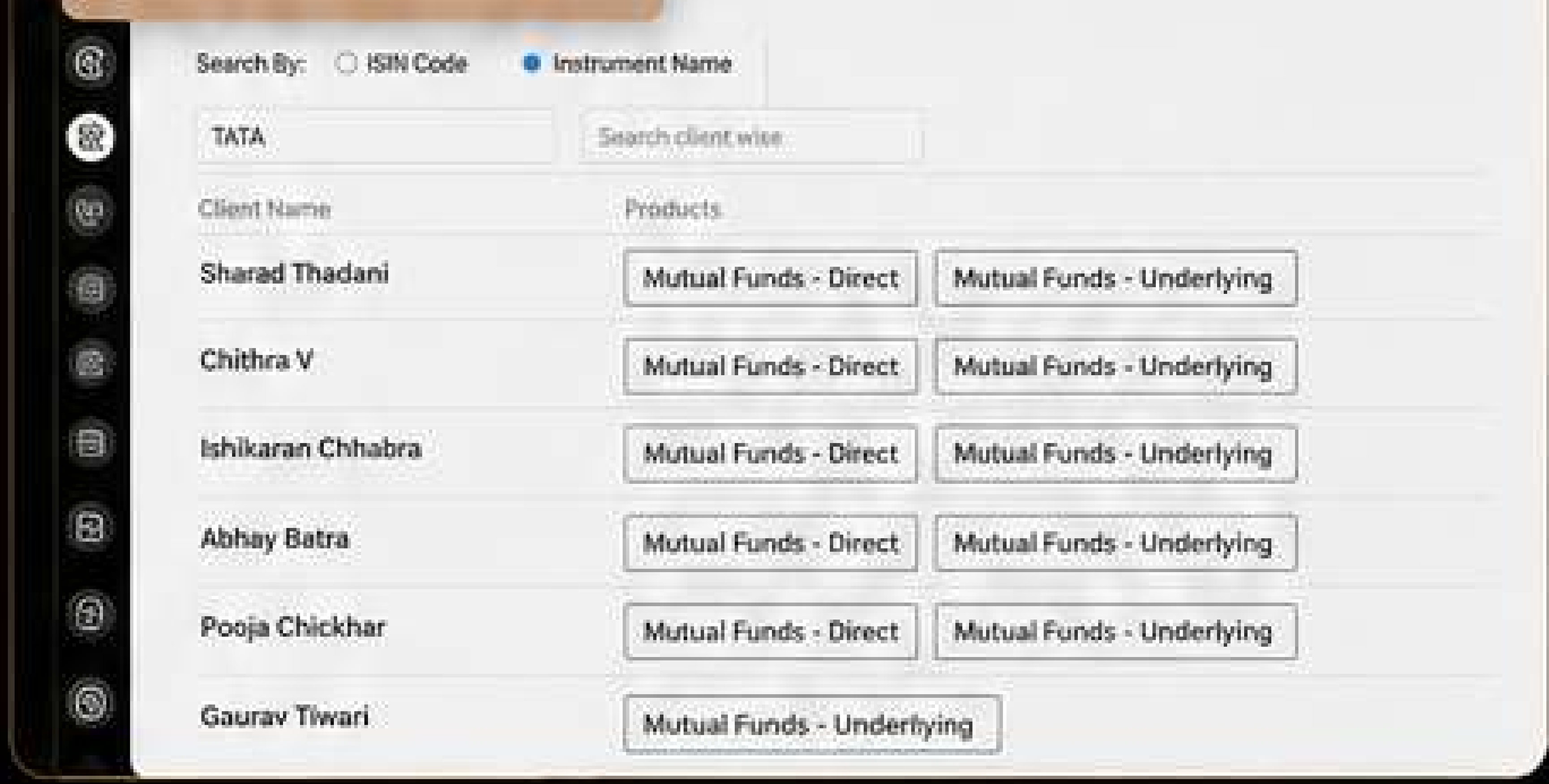
Compare Tool



Goal Planning Tool



Portfolio Scanner



The Centricity Advantage

Scale & Presence

20,000+
FPDs

₹14,000+ Cr
AUM

80+
Branches

800+
Team Members

22
States

A Stronger Network.
A Greater Impact.

Empowering advisors.
Enriching investor lives.

Centricity
Together Forward

BUILD YOUR FIRST 100 CLIENTS.

Build a Wealth Business.

> “Every successful wealth business starts with one trusted relationship.”

support@centricity.co.in | www.centricity.co.in | +91-9218067207

SCAN TO GET STARTED

Website | LinkedIn

Facebook /CentricityWealthTech

LinkedIn /centricity-wealthtech

YouTube /@CentriShala

Centrishala (Learning & Development) www.centrishala.co.in

Ready to grow?

Let’s build the future of wealth management together.