



Industry Trends & Dynasty Guidance

Q4 2025

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Insights from Q4 2025

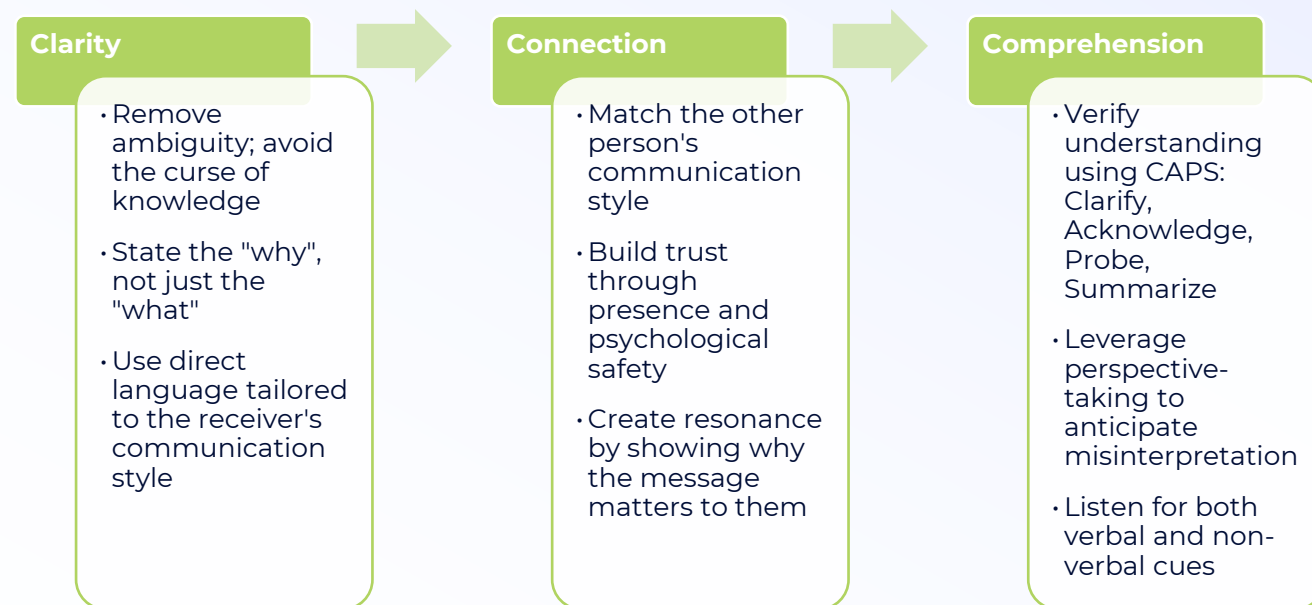


The Power of Overcommunication¹

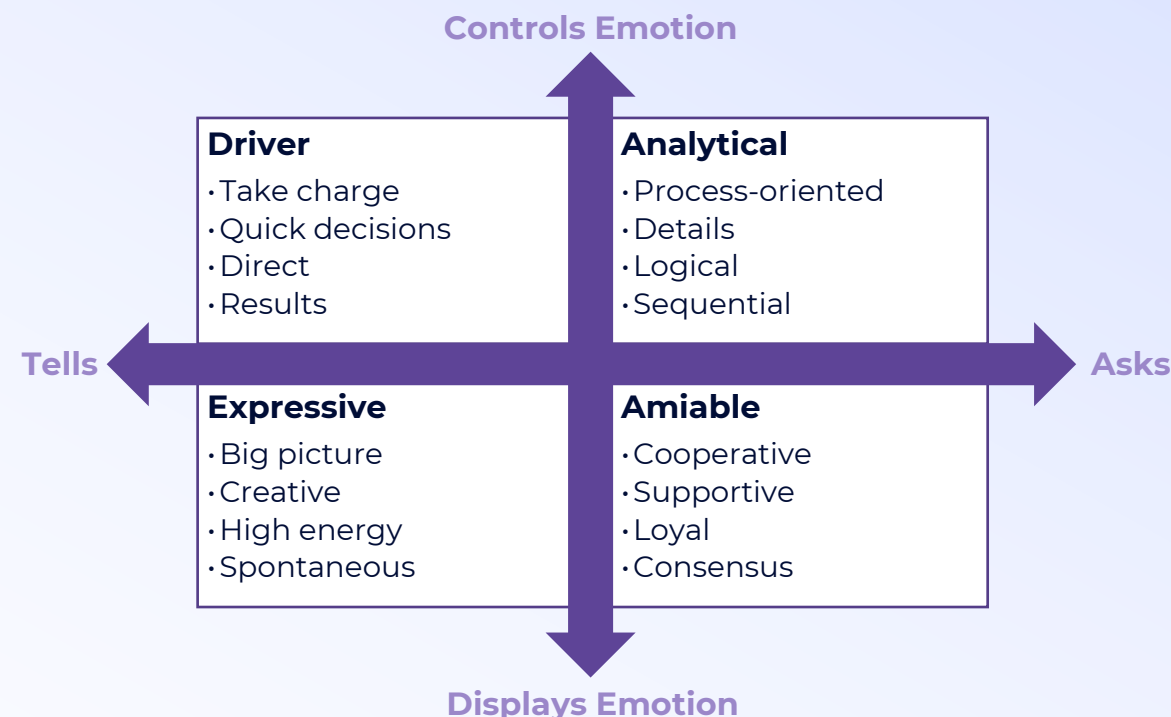
Leaders are 10x more likely to be criticized for under-communicating than over-communicating. The goal is not just to be understood; it is to ensure your message cannot be misunderstood.

By following the three-stage **Communication Model** and understanding **Communication Styles**, you can drive **Clarity**, build **Connection**, and ensure **Comprehension** with the receiver.

Communication Model



Communication Styles



Before sending any communication, ask: 1) *Is it clear?* 2) *Does it connect to the receiver's perspective and style?* 3) *Have I confirmed they truly understand it?* If you need support, your Dynasty Relationship Manager can help you **name communication styles** within your firm, **tailor your messaging**, and strengthen **clarity, connection, and comprehension** in both internal and client interactions.

Finding Your M-A-D Brand Advantage²



Your firm's brand is not just a logo, name, or set of messages. A brand is a cup that holds all the attributes your clients and prospects associate with your business, which is their perceived value. There are two big issues in a crowded market when you are trying to fill your brand cup:

- 1) It is impossible for a brand to be perfect for everyone.
- 2) People do not value firms until they need to.

Your goal should be to **create memory structures** full of **positive associations** for your primary brand, and any sub-brands. Ideally, those positive associations help prospects **choose your firm**. One tool to help figure out main brand benefits is **Benefit Laddering**, which helps find **functional and emotional benefits** that provide value-add solutions.



Emotional Benefit — What psychological need does it solve?

SO WHAT?

Functional Benefit — What functional benefit does the product/service deliver?
What functional need does it solve?

SO WHAT?

Features — Facts, attributes, details, objectively observable.

Strong brands have cups full of associations but own a distinct **MAD** benefit. This benefit is **M**eaningful, **A**uthentic, and **D**ifferent. You can work with the Dynasty Marketing Team to help **best position** your primary and sub-brands to **best differentiate** against your competition so that your target prospects potentially **choose your firm**.

Entrepreneurial to Professionalized Growth with Deliberate Practice³

High-growth RIAs do not improve by working harder, they improve by practicing differently. Deliberate practice is the structured, feedback-rich, uncomfortable, coach-supported method used by elite performers in every field. It is the difference between "I've got this..." and "I can get 10x better."

There are five conditions that must be present for an RIA to experience real growth:

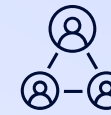


Practical Application for the Upcoming Quarter

- 1. Choose One Skill to 10x**
 - Pick a single high-impact skill, such as prospecting, discovery, storytelling, closing, or pipeline management
- 2. Use SMARTASS**
 - This will help you define what you will do every week to improve that one skill
 - Specific, Measurable, Achievable, Realistic, Timely, Apparatus, Support, Stop
- 3. Build Your Feedback Loop**
 - Commit to getting 3-4 pieces of feedback per week from a coach, peer, or manager
- 4. Practice in the Learning Zone**
 - Role-play more than you rehearse by yourself. Make practice harder than real-life conversations
- 5. Opt In or Opt Out**
 - Deliberate practice requires discipline and discipline is choice. Decide whether you are really committed to organic growth or not

If you are interested in professionalizing the growth of your firm, consider attending the upcoming **DIAL Growth Conference** taking place from April 28 to April 29. More information can be found in the **Dynasty Desktop** in the **NEW Network Events widget** on "My Dashboard".

Future-proof your RIA by Building an In-house Internship Program



For RIAs looking to create a pipeline of culturally-aligned professionals, internship programs offer a cost-effective way to build talent internally, reduce recruitment expenses, and shorten ramp-up times compared to external hires.

To create, run, and replicate a successful internship program, RIAs must consider the following:

PREPARING FOR INTERNS

- **Always be recruiting** and constantly identify elite talent to keep pipeline full.
- **Assess current gaps** in roles, responsibilities, or expertise to identify intern capacity, areas of focus, and length of program
- Create an intern **training and event calendar** prior to the start date to ensure all stakeholders are prepared to support the program when appropriate

TRAINING & DEVELOPMENT

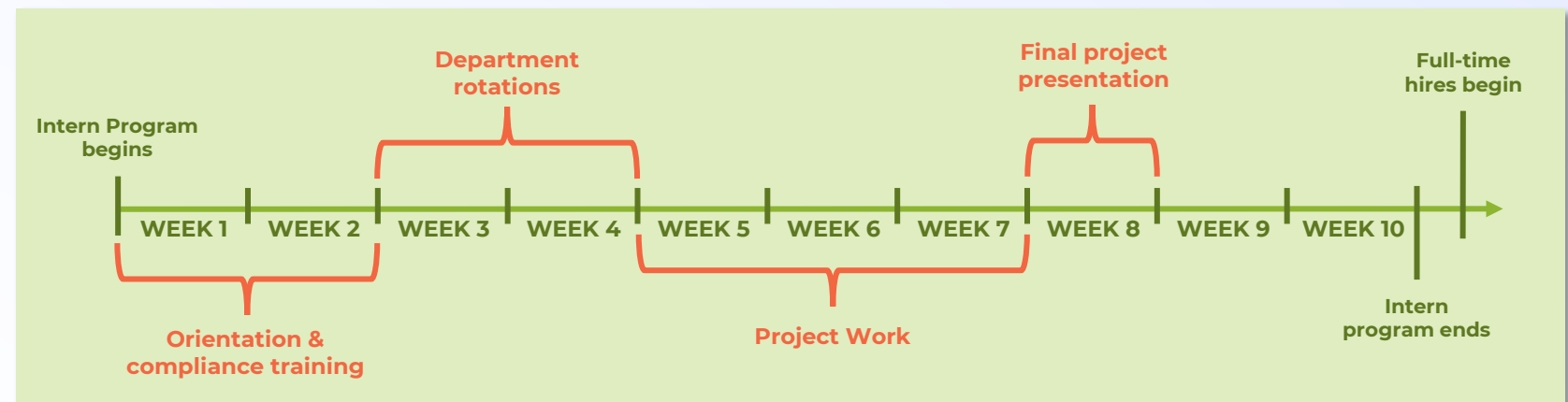
- **Week 1:** Orientation, compliance training
- **Weeks 2-4:** Department rotations
- **Weeks 5-7:** Project Work
- **Week 8:** Final project presentation
- Post-Internship: Feedback survey

DEVELOPING INTERNS

- Set the tone with a **standardized orientation program** to cover key contacts, technology, and expectations
- Establish clarity around roles and provide **meaningful, impactful tasks**
- Consider **informal biweekly check-ins** and **formal reviews** during the midpoint and final week to ensure interns are kept on track

RETAINING ELITE INTERNS

- Discuss **potential career paths** within the company and provide insights into various roles and promotion policies
- Offer structured support through **mentors** who can help interns build confidence and see a future at your firm
- Understand key drivers of satisfaction so you can offer **fair compensation** and **desired incentives**



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