

Bridging the gap: leveraging your MAP report to optimize your practice

A Morgan Stanley Managed Asset Profile (MAP) report can be a powerful tool to analyze and identify potential weaknesses in your practice. Yet it can be challenging to filter through reams of data, create a realistic plan to focus on high-value clients, and pursue better financial outcomes across your practice.

We can help you identify the chief factors that may be holding your practice back and help you prioritize common concerns, such as:



How much revenue am I leaving on the table if I'm unable to focus my efforts on the highest-value clients—or bring in new ones?



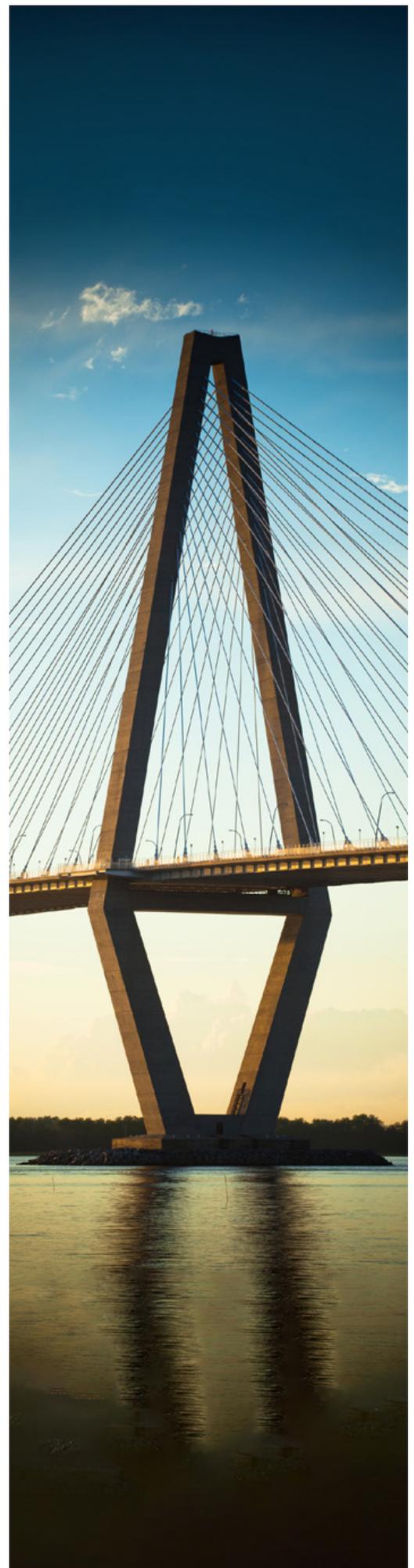
If I don't take a holistic look at the quality of investments across my practice, am I exposing clients to potential underperformance—and myself to possible legal risks?



Given today's market risks, am I adapting portfolio construction to align with current conditions?



Do I have an action plan for acquiring net new assets or for business succession planning?



These are some of the goals and outcomes that we believe we can help you achieve with insight from your MAP report



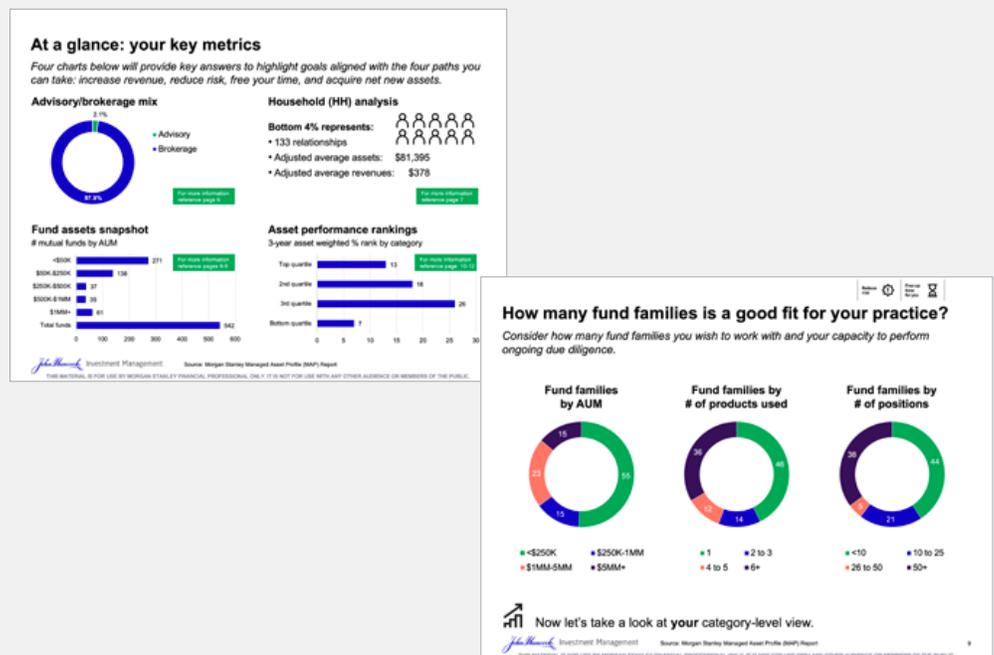
- Develop a realistic plan to streamline your business by helping you focus on the areas you want to emphasize
- Analyze brokerage assets versus higher-value advisory assets
- Winnow down unique funds and fund families to more manageable numbers
- Highlight investment styles where your business has an excess of unique funds
- Uncover low-performing funds and low-balance accounts that may merit review
- Identify client demographic groups or household types in which your practice is underrepresented

However, success in any of these areas requires identifying the chief concerns you have about your practice and being realistic about the amount of time you have to address these challenges. We can discuss the guide below, which is designed to help analyze which among the four paths in our program is the right first step for you.

MAP report analysis objective	Which path would you like to go down?			
	Increase revenue	Reduce risk	Free up your time	Acquire net new assets
Transition to high-value advisory assets	●	●	●	●
Rationalize household client mix	●	●	●	●
Streamline practice by scanning assets		●	●	
Determine which clients have underperforming assets	●	●	●	

Unlock the potential in your MAP report

Your proprietary analysis provides an in-depth, unvarnished look at the opportunities across your practice. We can help you prioritize and put a realistic, effective plan into action.



Four reasons why we're uniquely suited to help you *bridge* the gap

1 Our portfolio expertise

In addition to the assistance you can expect from our business consultants, we have a dedicated team of portfolio consultants that is prepared to offer its expertise in asset allocation and performance analysis.

2 Our in-house capabilities complemented by specialized expertise

While our in-house asset management teams offer a range of capabilities, we also scour the world for specialized expertise at unaffiliated managers whose skill sets we can tap to complement our own. This enables us to offer investors a variety of options in each category—a unique approach that we believe truly serves the interests of our investors. In helping you optimize your practice, we'll draw from this deep expertise.

3 Our commitment to financial stewardship

Our investment process begins with listening to the needs of our clients and leveraging our asset allocation heritage to anticipate portfolio deficiencies, then searching the world to find the right manager for each strategy. By thoroughly vetting those managers and setting a high bar for long-term risk-adjusted performance, we strive to be exceptional stewards of capital for our fund shareholders.

4 Our deep resources for professionals

Our model allows us access to a diverse range of investment and business-building insight from some of the best minds in the industry. In addition to offering a wide range of business-building tools and thought leadership on jhinvestments.com, we offer assistance from specialists with expertise in topics such as exchange-traded funds, portfolio construction, separately managed accounts, retirement, and education savings. In addition, the personalized assistance that our business consultants provide can help you navigate all these options and spend more time on what's most important: your clients.

Those four reasons, and our MAP report expertise, make John Hancock Investment Management an ideal partner to help you bridge the gap.



Get started today

Take these three steps to optimize your practice using a MAP report.

- 1 Place an order for a MAP report now.
- 2 Book a meeting with your John Hancock Investment Management business consultant to review initial findings, followed by regular meetings over the next few months to set the plan in motion.
- 3 See your practice transform.



Learn more

Financial professionals: Ask a John Hancock Investment Management business consultant for a review of how our practice management materials can help you build your business.

John Hancock Investment Management

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