Discovery Data

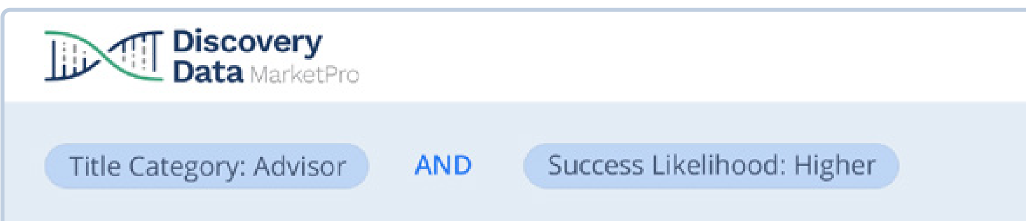
Success Likelihood

In Discovery Data we assign a Success Likelihood indicator to all reps not categorized as Known Non-Advisor to help our clients prioritize outreach efforts by starting with those reps most likely to be successful financial advisors.

Rather than "predicting" what a rep's AUM is, the Success Likelihood indicator formula works by identifying specific aspects of an advisor's profile that together increase the likelihood of identifying the advisor's success level. This approach has been thoroughly tested on branch offices around the country and found to be highly accurate.

We have identified over 100,000 advisors who have a higher likelihood of being in the top half of performers by assets and production. Here is the profile for **Higher Success Likelihood**:

- Series 6 or 7 license for 7 or more years; and
- Registered in 9 or more states



It is unusual for an advisor to reach a reasonable level of success without ending up with clients in many states. This typically happens by clients relocating and by referrals.

All remaining reps not classified as Known Non-Advisor or as Higher Success Likelihood are classified as **Lower Success Likelihood**.

Although our Success Likelihood indicator is not perfect, you will find that a high percentage of the most successful advisors are classified as Higher Success Likelihood, but you will also find some mistakenly classified as Lower Success Likelihood. In addition, a relatively small number of not-so-successful advisors will be in Higher Success Likelihood. There are a small number of long-tenured advisors who have clients in a large number of states, yet do not do significant business.

If you have any questions or feedback regarding Success Likelihood, please contact the Client Success Team at 732-933-1899 or support@discoverydata.com.

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