NEWS

For Immediate Release

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ClientWise Appoints Tim Whiting as Chief Growth Officer to Lead Strategic Account Growth Strategy

Whiting to bridge sales and marketing for strategic business growth

Dallas, TX [February 6, 2025] – ClientWise – a premier business and executive coaching and consulting firm working exclusively with financial professionals and wealth managers – today announced that financial services veteran executive Tim Whiting has, as of January 13, 2025 joined the firm to serve as Chief Growth Officer.

In this role, Whiting will be responsible for the continued growth of ClientWise's professional coaching and consulting services – functioning as a vital strategic bridge between sales and marketing. He will also oversee key account management, business development, relationship management, and further enterprise adoption of the ClientWise Business Builders Academy™ and the new ClientWise Valuation service offering.

Whiting brings with him over 20 years of experience in the financial services and advisory profession, having served most recently as the Chief Revenue Officer for the Investments & Wealth Institute (formerly

IMCA). Prior to the Institute, he oversaw all aspects of sales and marketing for SourceMedia's Investment Advisor Group (now Arizent), including their flagship publication brand Financial Planning. Prior to SourceMedia, he was the Corporate Relations Manager for the Financial Planning Association (FPA). Whiting earned a bachelor's degree in economics from the University of Richmond. He will be based in Ridgewood, New Jersey and travel frequently to the firm's headquarters in Dallas, Texas.

"ClientWise has a proven track record of helping advisors drive sustainable, intentional growth and maximize the long-term value of their practices," Whiting said. "As our industry increasingly moves towards a team-based structure, ClientWise is uniquely positioned to help individual advisors, teams, and ensembles expand their leadership, get clarity about their future, and ultimately build successful and enduring businesses to better serve their clients for generations. I'm thrilled to be joining ClientWise at this dynamic time."

"What differentiates ClientWise from other coaching firms is an experienced bench of 25 International Coaching Federation (ICF) certified coaches, coupled with the ability to tailor the coaching experience to match any advisor's unique objectives," Whiting continued. "Our credentialed coaches and veteran consultants deliver tangible, measurable results – not just over a quarter or a year, but results that endure year-after-year by transforming the way advisors do business. This greatly benefits financial advisors seeking intentional growth, looking to streamline and operationalize more of their processes or better prepare the next generation to assume the mantle of leadership."

"As we begin our 20th year of operations, ClientWise is more committed than ever to supporting the strong, sustainable growth of our financial advisory clients," notes Ray Sclafani, CEO and Founder of ClientWise. "The addition of Tim to our team is a major step forward in furthering that noble mission – bringing fresh insights and expertise to the challenges associated with scalable growth, building enterprise value, and ensuring that the best firms ultimately endure."

ABOUT CLIENTWISE

Founded in 2006, ClientWise has established itself as the premier business and executive coaching firm, working exclusively with financial professionals and wealth managers. With a focus on growth and long-term success, ClientWise partners with advisors, wholesalers, managers and executives to develop personalized strategies which align with their unique goals. Through a tailored coaching approach, the firm provides guidance and actionable solutions to enhance performance and drive meaningful business results.

ClientWise's certified coaches are members of the International Coach Federation (ICF) and follow its strict code of ethics. With extensive coaching experience, they provide guidance and support tailored to the unique challenges and opportunities financial professionals encounter each day.

Drawing from an in-depth knowledge of the financial industry, ClientWise's mission is to professionally develop industry leaders and consistently raise the bar for industry service, commitment and integrity. The firm's relationship with Barron's Advisor as their exclusive coaching partner is designed to help raise the standards of client care in wealth management. ClientWise believes in the power of shared wisdom and constant learning. Simply put, the firm's singular focus is to help financial advisors and wealth managers get clear, get focused and get results. To learn more, please visit https://www.clientwise.com/.

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