

Cracking the Client Code

Data-Driven Financial Advisor Prioritization

MFS Team: Brian Shaw, Suzet Nkwaya | MIT Advisor: Rodrigo Verdi

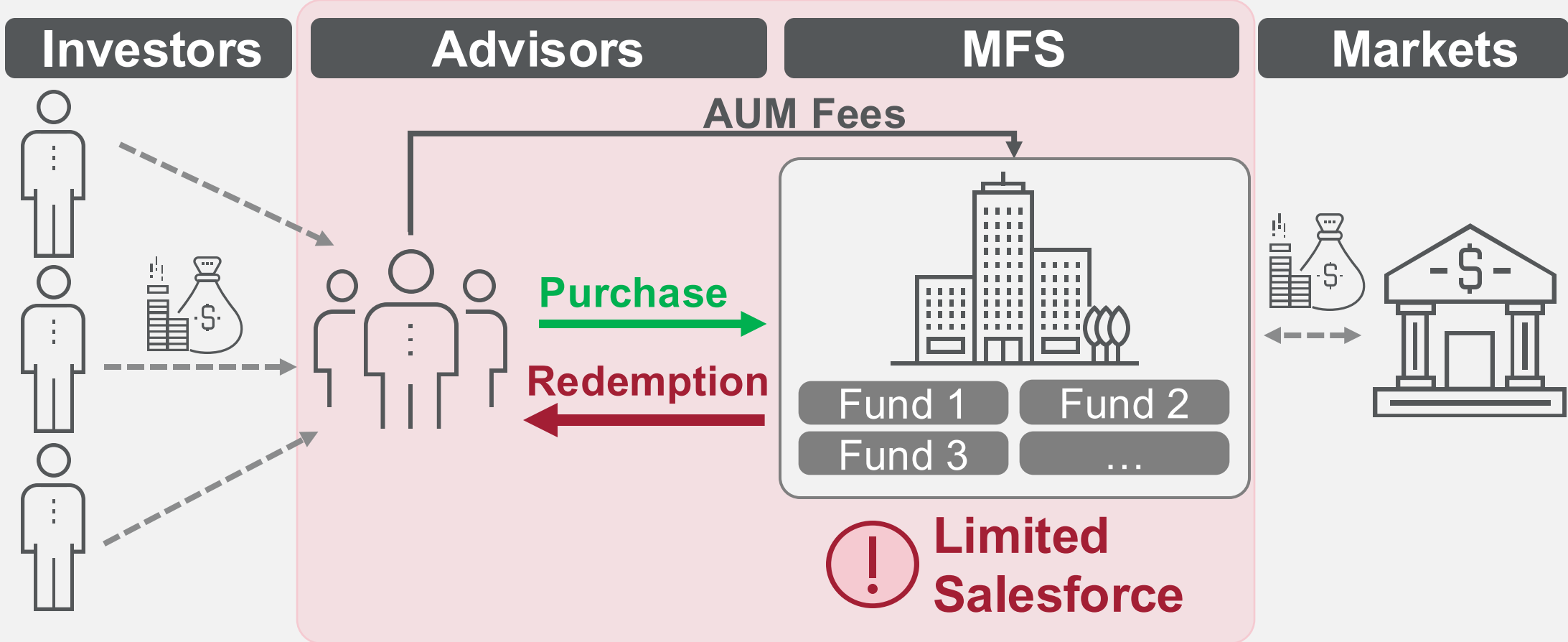


Tim
Seeberger



Maximilian
Knuth

Problem Statement

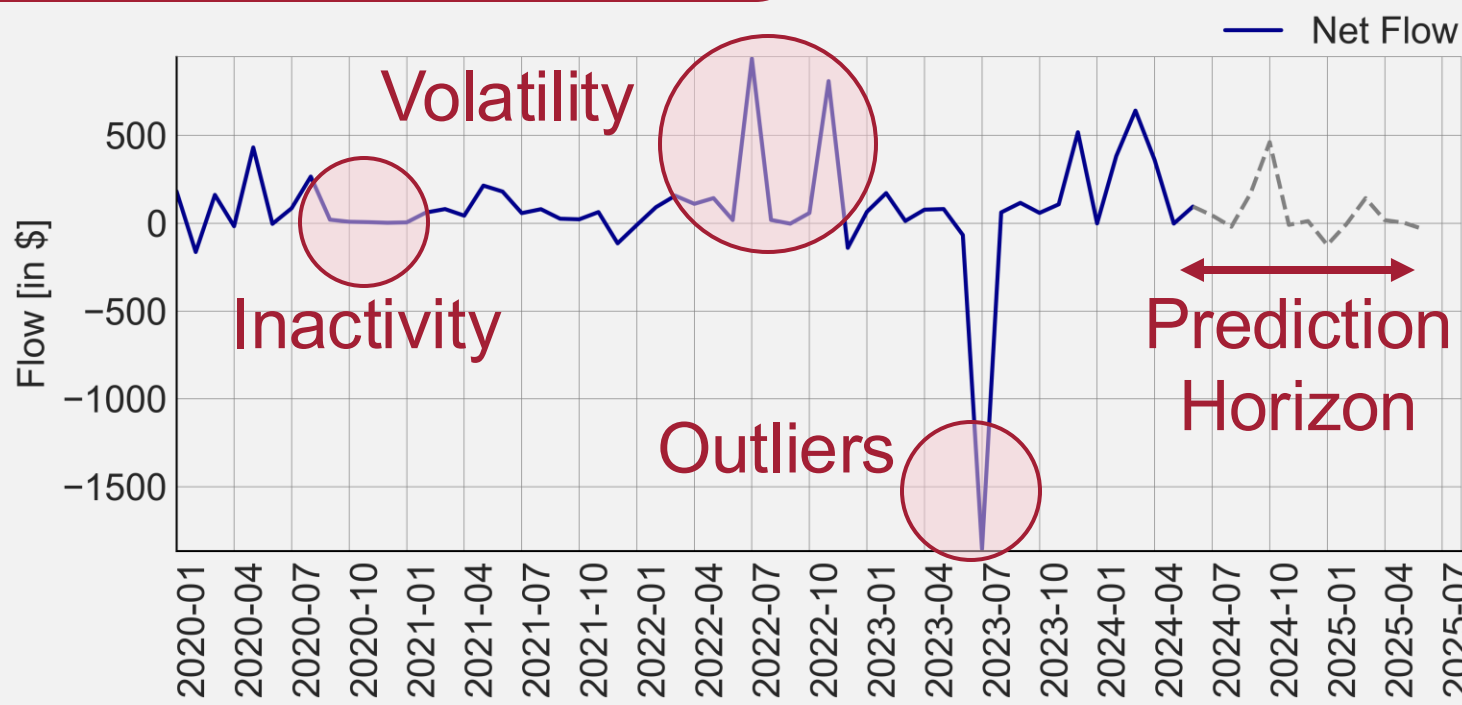


“Understanding advisor net flows is critical for MFS to allocate its limited salesforce effectively and maximize assets under management through **targeted engagement**”

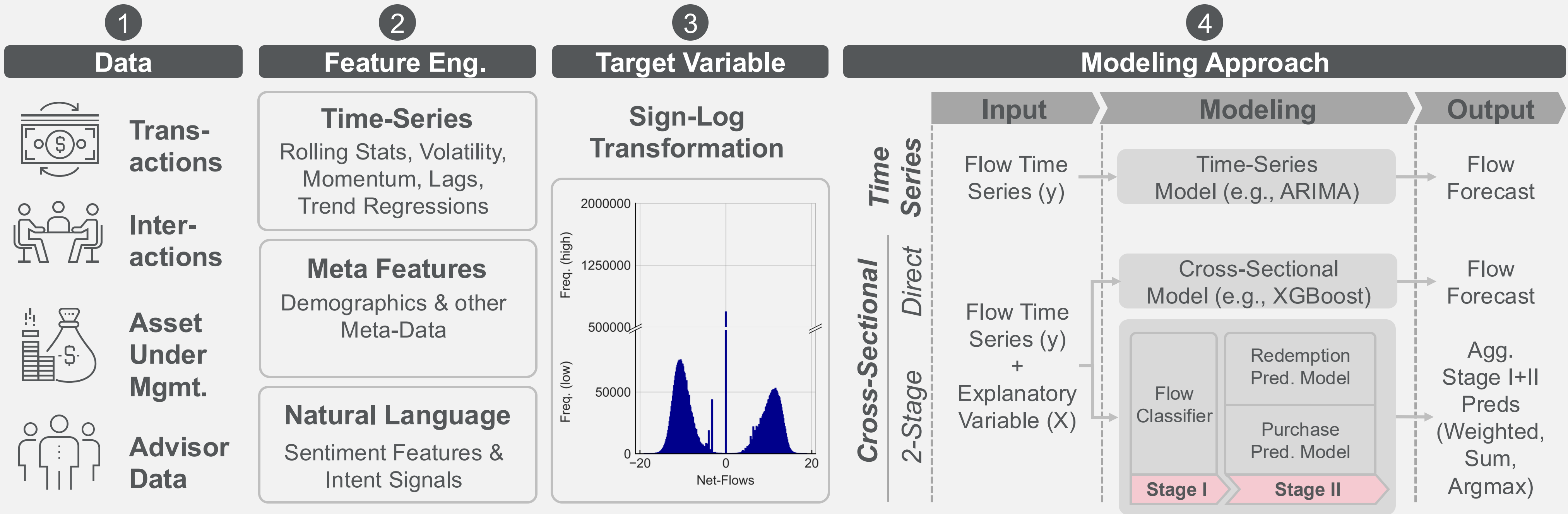
Objective

“Develop a **data-driven framework** to optimize client-mix by **predicting advisor net flows** and ranking advisors to guide **prioritization**”

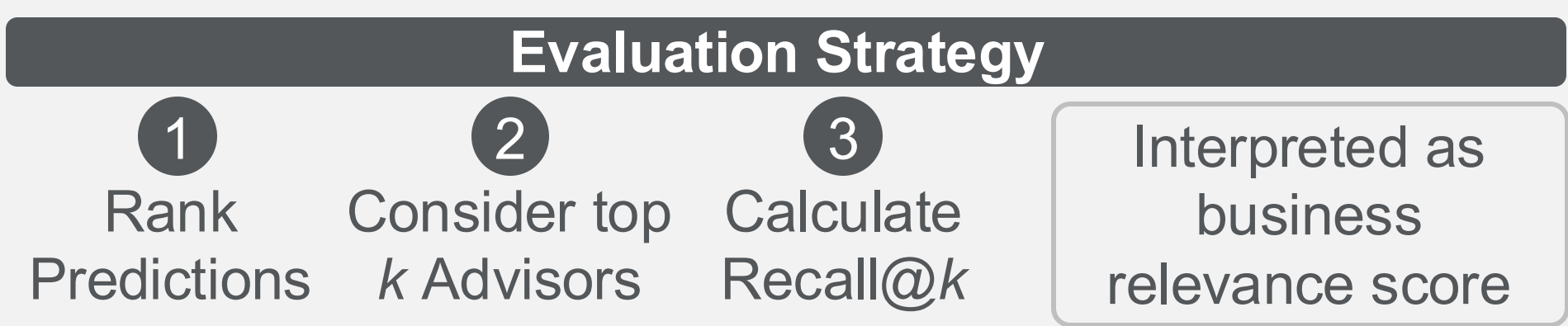
Flow Prediction



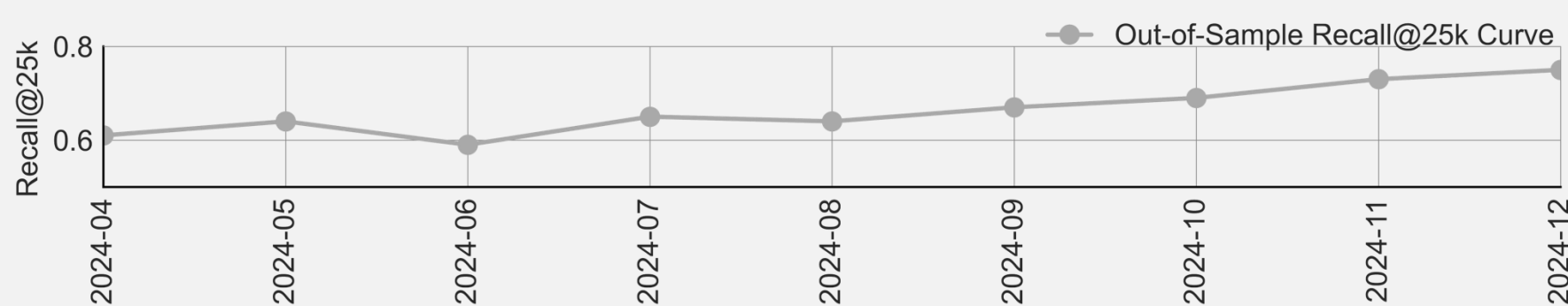
Methodology



Results



Out-of-Sample Performance (Recall@25k)



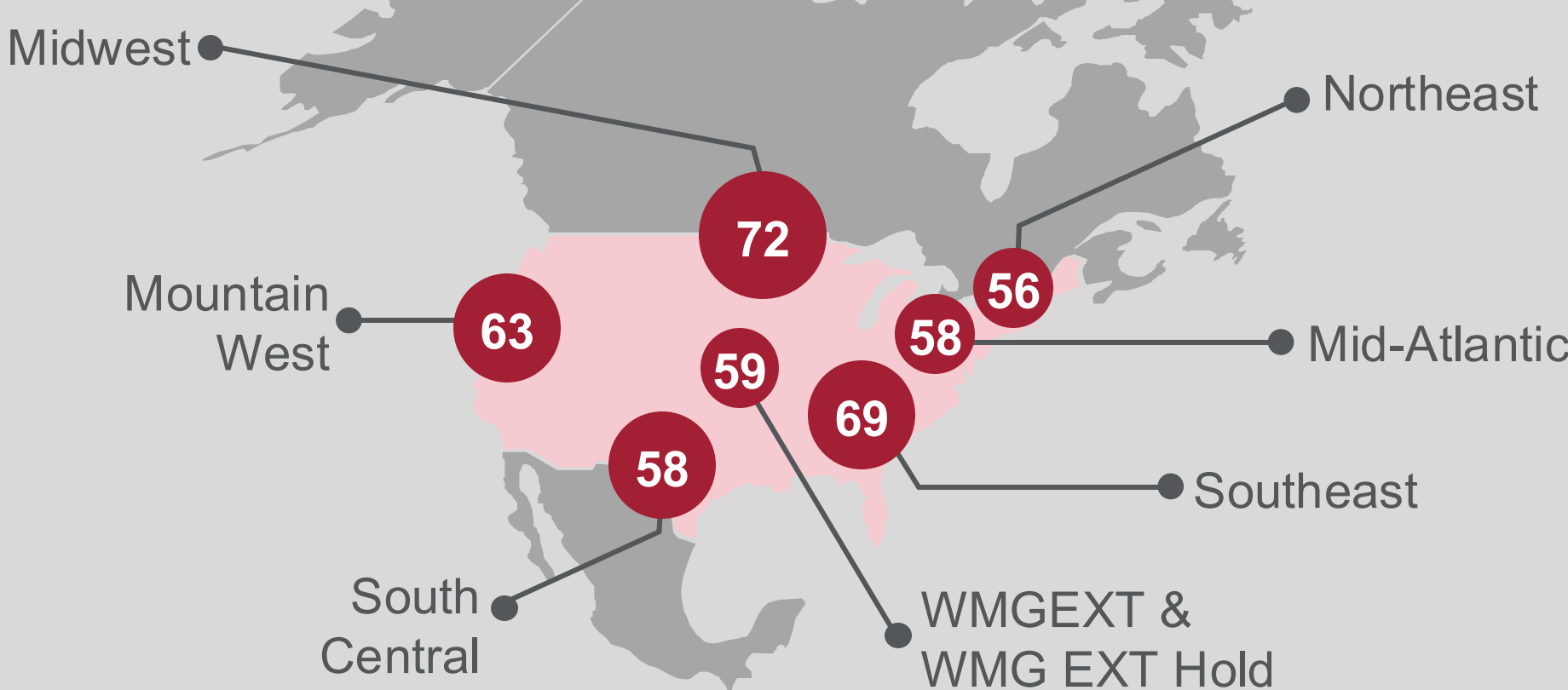
65% Avg. Recall

59% Min. Recall

78% Max. Recall

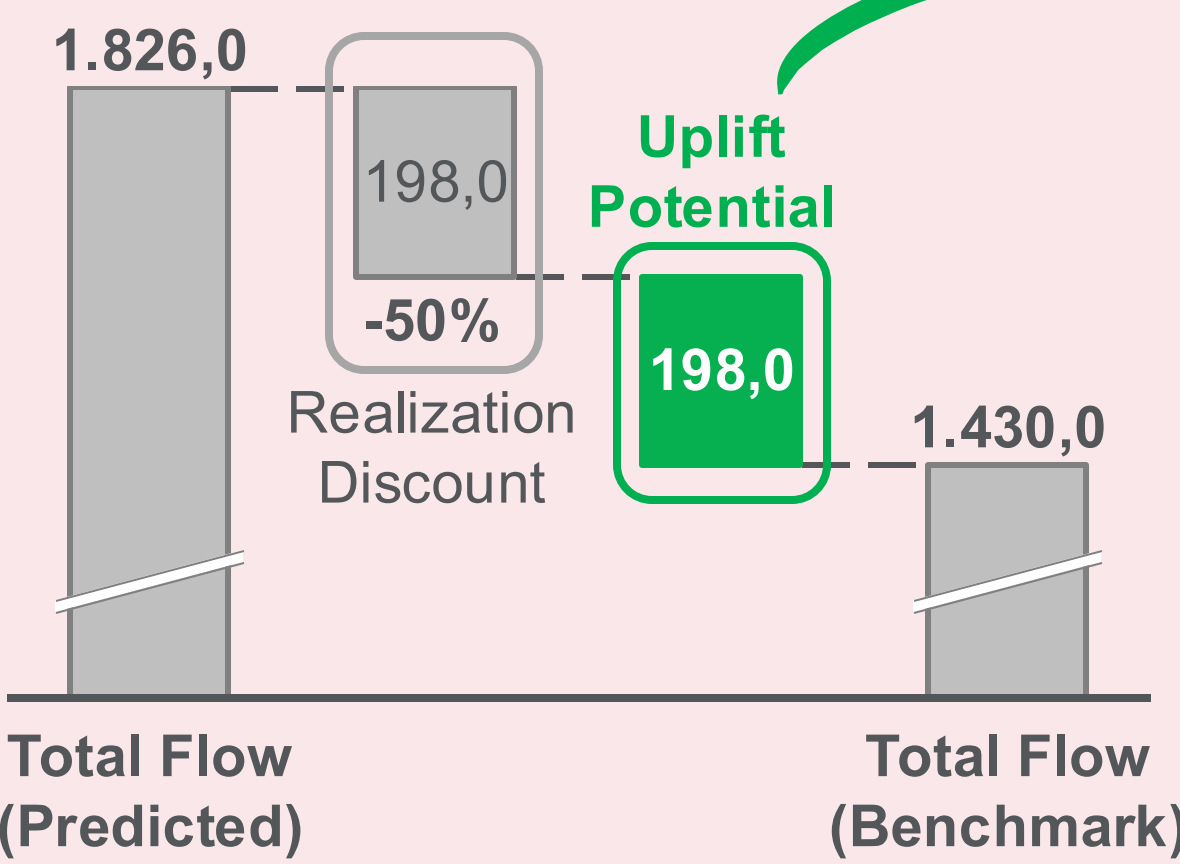
Regional Evaluation

Regional Recall@25k



Business Impact

All Numbers in M\$



\$198,0M x 1%
Potential AUM Fees

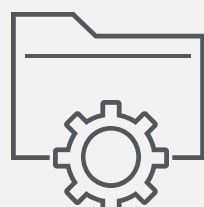
+\$2.0M

**Gain Through
Machine Learning
Forecasting**

“Powering **advisor prioritization** through **predictive intelligence**—to unlock sales potential and drive long-term **AUM growth**.”

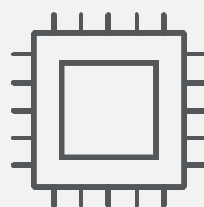
Outlook

Data Foundation



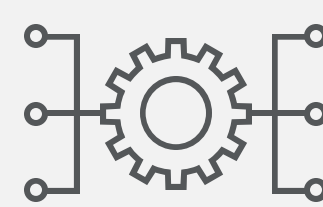
More data history and variety improve signal-to-noise ratio

Deep Learning



Multi-modal ML hold promise for superior performance

Prescription



Optimization unlocks more flexible decision-making