KITCES SUMMIT

KITCES FINANCIAL PLANNING VALUE SUMMIT

See How Successful Advisors Are Communicating and Demonstrating the Ongoing Value of Financial Planning

Thursday, December 7, 2023

In this workbook

Introduction

This workbook is designed to help you capture key notes as you go behind the scenes with our expert guests during the information-packed Summit. There is space within this workbook for you to start mapping out your plan of action.

Communicating and Demonstrating the Ongoing Value of Financial Planning

The transition from "pure" investment management services to providing more holistic financial planning has been underway for more than a decade, as advisory firms either try to expand their value to defend against fee compression, or increasingly offer advice as a standalone service to generate standalone advice fees. Yet the challenge is that historically, financial planning was always paid via subsequent product implementation, or as a part of an AUM fee… such that advisors have never really had to 'prove' their financial planning value the way they do now with a more fee-for-service approach.

The Kitces Financial Planning Value Summit will focus on what ongoing financial planning value looks like when it's done successfully, with a unique behind the scenes look at real financial advisors' tactics to demonstrate their value upfront to prospects and ongoing with clients.

Top of Funnel
On-Going Client Meetings

Middle of Funnel
In Between Client Meetings

Bottom of Funnel
Prospect Meetings

Agenda

Expert guests will take you behind the scenes with real-world examples of what advisors can do to demonstrate the ongoing value of financial planning.

The Value of Ongoing Financial Planning

Michael Kitces
Founder and Chief Financial Planning Nerd, Kitces.com

The Value of Ongoing Financial Planning

Taylor Schulte, CFP
Founder, Define Financial

Using a "First Year Blueprint" to Show/ Demonstrate Financial Planning Value to Prospects

Veronica Karas
Senior Financial Advisor, CAPTRUST

Using Asset Map To Help Prospects Visualize the Value of Working Together

Cameron Valadez
Founder, Planable Wealth

Creating a Personal Website as a Portal for Each Client by Leveraging Google Sites

Mike Zung
Founder, Java Wealth Planning

Using Values-and-Goals Cards To Build Rapport With New Clients

Tiffany White
Certified Financial Planning, Halter Ferguson Financial, LLC

Using a One-Page Financial Dashboard To Maximize Value During Client Meetings

Riley Anderson
Wealth Advisor, InvestorDNA

Creating a Systematized Client Agenda Process To Make Client Review Meetings More Meaningful

John Mason
President & Lead Financial Planner, Mason & Associates

Michael Kitces & Taylor Schulte

The Value of Ongoing Financial Planning

Session Notes

Michael Kitces & Taylor Schulte

The Value of Ongoing Financial Planning

Key Takeaways From This Session

Plan Of Action

What is the first (small) action you're going to take in the coming week to move forward?

Veronica Karas

Using a "First Year Blueprint" To Show/Demonstrate Financial Planning Value to Prospects

Session Notes

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Cameron Valadez

Using Asset Map To Help Prospects Visualize the Value of Working Together

Session Notes

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Using Asset Map To Help Prospects Visualize the Value of Working Together

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Mike Zung

Creating a Personal Website as a Portal for Each Client by Leveraging Google Sites

Session Notes

Mike Zung

Creating a Personal Website as a Portal for Each Client by Leveraging Google Sites

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Tiffany White

Using Values-and-Goals Cards To Build Rapport With New Clients

Session Notes

Tiffany White

Using Values-and-Goals Cards To Build Rapport With New Clients

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Riley Anderson

Using a One-Page Financial Dashboard To Maximize Value During Client Meetings

Session Notes

Riley Anderson

Using a One-Page Financial Dashboard To
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John Mason

Creating a Systematized Client Agenda Process To Make Client Review Meetings More Meaningful

Session Notes

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