


KITCES  SUMMIT


Welcome, Advisers!

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Meet Your Summit Hosts


Michael Kitces
Kitces.com


Taylor Schulte
Define Financial

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Housekeeping Notes

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Agenda


	12:00	Welcome & Housekeeping
	12:05	Personal Leverage in Marketing
Referral Marketing	12:25	Yohance Harrison
	1:00	Lauren Oschman
	1:30	Break
Credibility Marketing	1:40	Tim Goodwin
	2:15	Matt Hylland
	2:45	Break
Video Content Marketing	2:55	Dave Zoller
	3:30	Nate Hoskin

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**Download the
Attendee Workbook in
the Handouts tab**

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**Access handouts
provided by the guests
in the Handouts tab**

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A recording is included with your registration and will be available by tomorrow evening.

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Use the Chat tab to share thoughts and ask questions

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Post-Summit Community Conversation

Make a connection.
Process what you've learned.

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Shoutout to the Kitces Summit Adviser Ambassadors!

Adam Chapman, YESmoney
Andrew McFadden, Panoramic Financial Advice
Greg Hammond, Hammond Iles Wealth Advisors
Jason Pereira, Woodgate Financial Inc.
Joshua Farmer, Brookstone Wealth Management

Justin Peek, Peek Wealth
Nathan Brown, My Personal CFO
Phil Weiss, Apprise Wealth Management
Tina Mistry, Portfolio Advisors, Inc.
Scott Sather, Awaken Wealth Management

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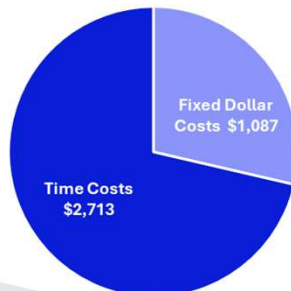
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What are we doing here?

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What Does It Take To Get A New Client?

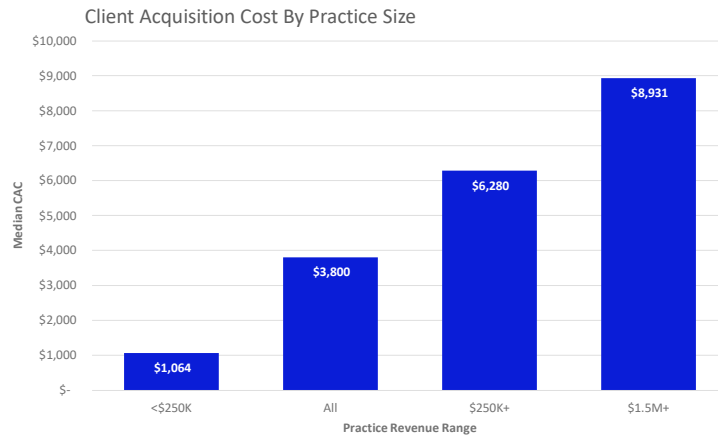
Aggregate Client Acquisition Cost Across All Advisors And Strategies



Fixed Dollar Costs	\$1,087
Time Costs	\$2,713
Client Acquisition Cost	\$3,800

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Your Marketing Isn't Scaling ☹️



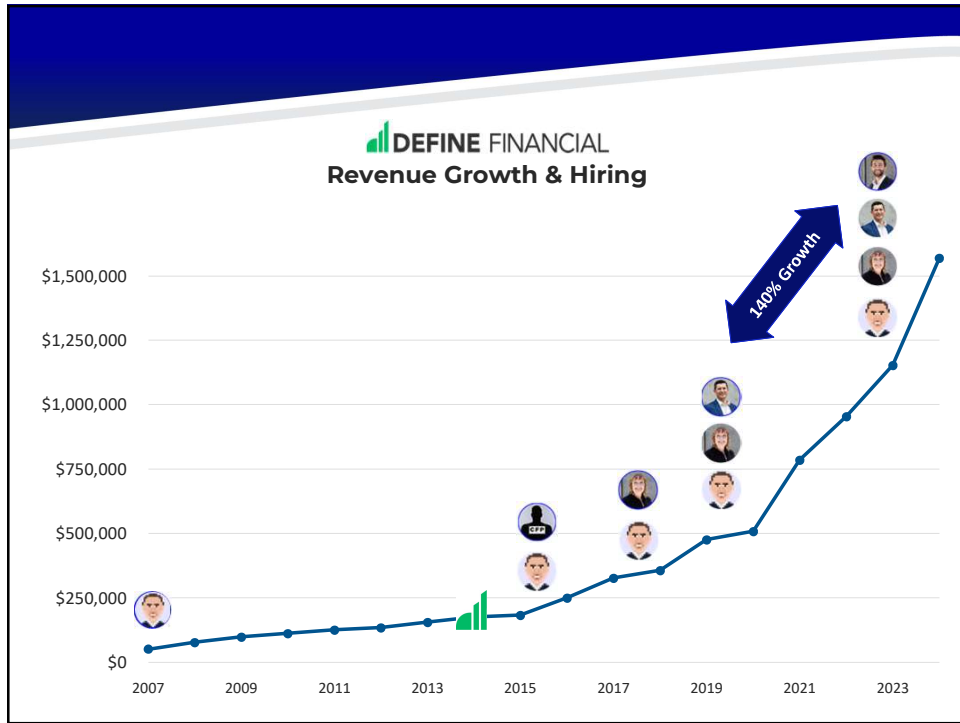
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Traditional "Scalability" in Marketing: Teams





	"Junior" Advisor	"Associate" Advisor
Primary Task	Help to prospect for new clients	Take over existing clients
Pros	-Lowers cost of time -Doesn't require owner's time	-Lowers cost to service -Leverages the owner's time
Cons	Retention (split the pie, or lose it)	Burden on owner's shoulders

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Unlocking (More) Scalable Marketing

	Leverage Personal Strengths	Spend Money Not Time
Pros	<ul style="list-style-type: none"> -Amplify owner's strengths -It's already working 	<ul style="list-style-type: none"> -Easier to turn the dial up/down -Lower-cost sales associates
Cons	<ul style="list-style-type: none"> -Burden still on owner's shoulders -Takes team support 	<ul style="list-style-type: none"> -More \$\$\$ upfront -Changing to tactics outside core competency?

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Generating Personal Leverage

COIs



DON'T: Have lunch with them one at a time.

DO: Interview them for your podcast, then distribute to your list and theirs.

Articles



DON'T: just write blog posts about financial topics.

DO: Create around a coherent theme for your ideal client and repurpose into the chapters of a book!

Seminars



DON'T: Just deliver at the local community college.

DO: Record and make them findable on YouTube, then share clips on social media!

Networking



DON'T: Just join the local Chamber of Commerce.

DO: Optimize your website for local SEO so everyone local finds their way to you!

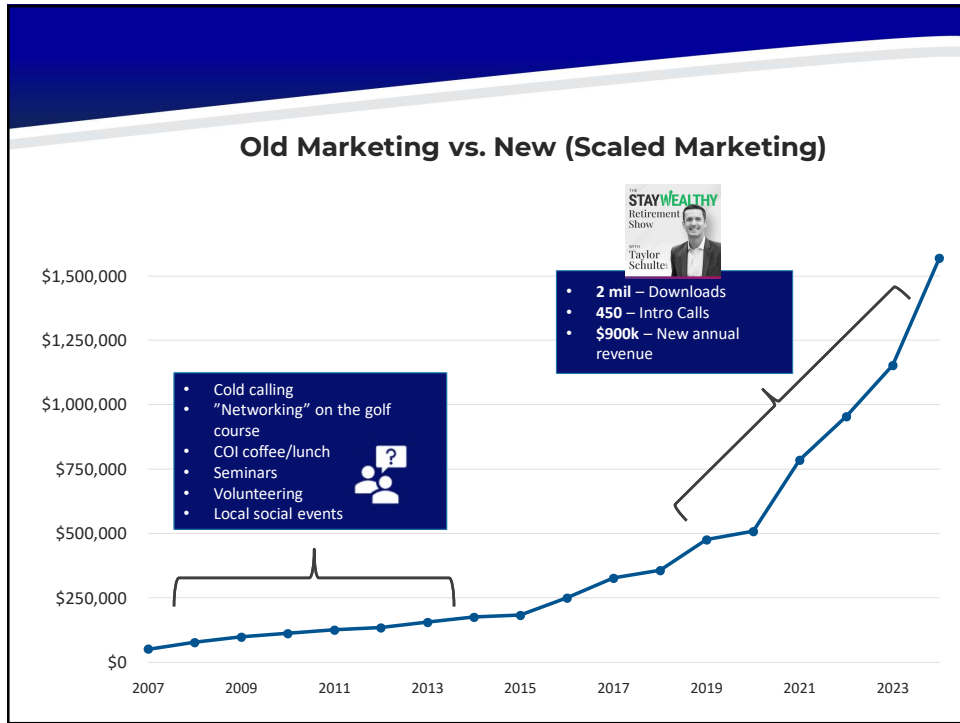
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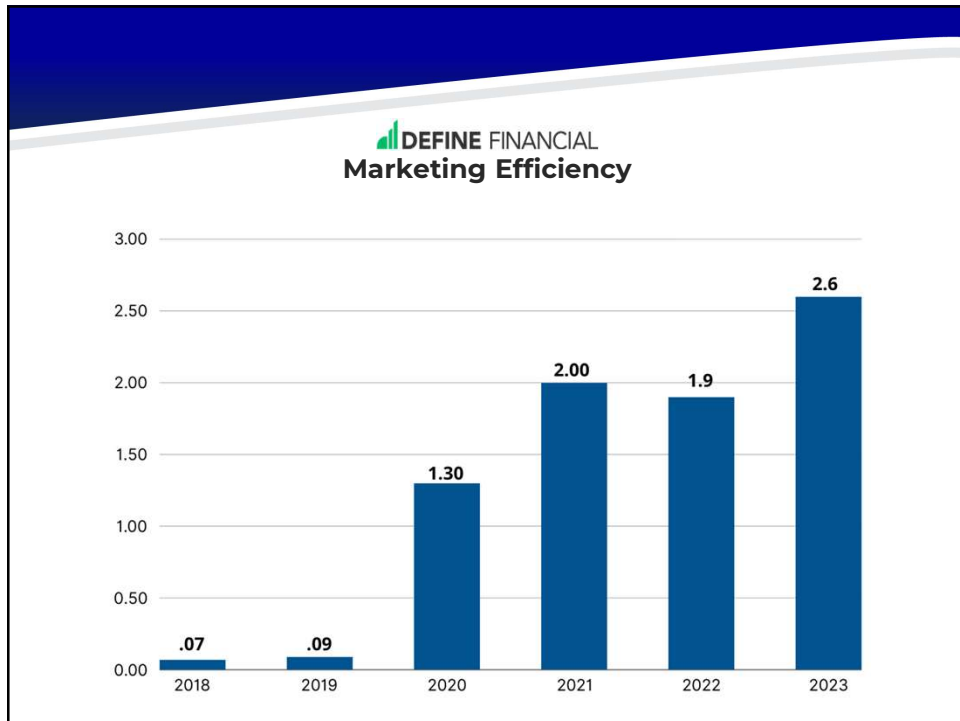
Which path to marketing scalability most excites you?

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How will you leverage yourself?

What best aligns to your natural gifts and style?

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The infographic is centered around three icons of a person's head with a lightbulb inside, representing different marketing strategies. Each strategy is connected to a specific person and their unique approach.

- Referrals:** Yohance Harrison (Identifying Referral "Kings and Queens To Accelerate Client Referrals") and Lauren Oschman (Restructuring The Close of Every Client Meeting To Encourage Referrals).
- Credibility:** Tim Goodwin (Getting More Local Clients With Systematized Processes To Collect Client Google Reviews) and Matt Hylland (Growing An Email List That Actually Converts To New Clients).
- Videos:** Dave Zoller (Creating Templated Video Content To Build Your Brand Awareness) and Nate Hoskin (Creating A Consistent Prospect Pipeline In Under 3hrs/Week Using Short Form Videos).

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Thanks for joining us!

Let's Get Started!

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