KITCES SUMMIT

KITCES MARKETING SUMMIT

Common Advisor Marketing Tactics...

Done Uncommonly Well

Thursday, April 25, 2024

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.

See How Successful Advisors Are Marketing Their Financial Planning Services

Instead of telling you what you 'should' be doing as an advisor, our Kitces Summit guests are all practicing financial advisors who will actually show you what actions they've taken to market their expertise to clients and prospects, so you can see what's really possible for yourself.

At the Kitces Marketing Summit, you'll have a chance to see what common advisor marketing tactics looks like when they are done uncommonly well with unique behind-the-scenes looks at real financial advisors' strategies that attract clients.

No vendors. No sponsors. Just a series of 30-minute real conversations between our co-hosts – Michael Kitces and Taylor Schulte – and our expert guests, financial advisors who will screenshare their actual marketing strategies and show how they communicate their value to prospects and clients.

Agenda

Expert guests will take you behind the scenes with real-world examples of what advisors can do to market themselves to prospects and clients.

Personal Leverage In Marketing

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

Personal Leverage In Marketing

Taylor Schulte, CFP®
Founder, Define Financial

Identifying Referral "Kings and Queens" to Accelerate Client Referrals

Yohance Harrison, BFA™, CRPC®
Founder, CEO & Behavioral Financial Advisor,
Money Script Wealth Management

Restructuring the Close of Every Client Meeting to Encourage More Client Referrals

Lauren Oschman, CFP®, CDFA®
Partner & CEO, Vestia Wealth Advisors

Getting More Local Clients With Systematized Processes to Collect Client Google Reviews

Tim Goodwin, CFP®
Founder & Senior Wealth Advisor, Goodwin Investment Advisory

Growing an Email List That Actually Converts to New Clients

Matt Hylland
Financial Planner & Partner, Arnold & Mote Wealth Management

Creating Templated Video Content to Build Your Brand Awareness

Dave Zoller, CFP®
Advisor & Owner, Streamline Financial Services

Creating a Consistent Prospect Pipeline in Under 3 Hours/Week Using Short-Form Videos

Nate Hoskin, CFP®, AWMA™
Founder & Lead Advisor, Hoskin Capital

Michael Kitces & Taylor Schulte

Personal Leverage In Marketing

Session Notes

Michael Kitces & Taylor Schulte

Personal Leverage In Marketing

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?

Yohance Harrison

Identifying Referral “Kings and Queens”
to Accelerate Client Referrals

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Lauren Oschman

Restructuring the Close of Every Client Meeting
to Encourage More Client Referrals

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Tim Goodwin

Getting More Local Clients With Systematized Processes to Collect Client Google Reviews

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Matt Hylland

Growing an Email List That Actually Converts to New Clients

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Dave Zoller

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to Build Your Brand Awareness

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Nate Hoskin

Creating a Consistent Prospect Pipeline in Under 3 Hours/Week Using Short-Form Videos

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