

KITCES MARKETING SUMMIT

# Common Advisor Marketing Tactics...

*Done Uncommonly Well*

Thursday, April 24, 2025

# In this workbook

Introduction .....	3
Trust-Building Tactics.....	4
Agenda.....	5
Michael Kitces & Taylor Schulte .....	7
David Sandhu .....	9
Josh Ross .....	11
Tim Goodwin .....	13
Adam Chapman .....	15
Libby Greiwe .....	17
Tiffany Charles .....	19

# 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.



## Trust-Building Tactics To Attract And Win More Prospective Clients

**Michael Kitces**

Founder & Chief Financial Planning Nerd, [Kitces.com](http://Kitces.com)



## Trust-Building Tactics To Attract And Win More Prospective Clients

**Taylor Schulte, CFP®**

Founder, Define Financial



## Using LinkedIn Navigator To Fill Educational Webinars With (Cold) Prospects

**David Sandhu, CRPC**

Senior Financial Advisor, EverSource Wealth Advisors



## Leading In-Person Educational Workshops That Consistently Attract High-Quality Prospects

**Josh Ross, MBA, EA**

Founder, Energized Retirement Planners



## Building An Automated 6-Step Email Series That Converts Digital Prospects To Become Ongoing Clients

**Tim Goodwin, CFP®**

Founder & Senior Wealth Advisor, Goodwin Investment Advisory



## Developing An Unconventional Thank-You Note Strategy To Generate More Referrals From COIs

**Adam Chapman**

Founder, YESmoney



## Running Client-Hosted Referral Events To Authentically Attract New Long-Term Relationships

**Libby Greiwe**

Founder & CEO, The Efficient Advisor



## Implementing A 3-Meeting Relationship-Building Process With New COIs To Start A Steady Stream Of COI Referrals

**Tiffany Charles**

Chief Growth Office & Partner, Destiny Capital & Entrepreneur Aligned



# Michael Kitces & Taylor Schulte

Trust-Building Tactics To Attract  
And Win More Prospective Clients

## Session Notes



# Michael Kitces & Taylor Schulte

Trust-Building Tactics To Attract  
And Win More Prospective Clients

## 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?*





# David Sandhu

Using LinkedIn Navigator To Fill Educational Webinars With (Cold) Prospects

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# Josh Ross

Leading In-Person Educational Workshops That  
Consistently Attract High-Quality Prospects

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# Tim Goodwin

Building An Automated 6-Step Email Series  
That Converts Digital Prospects To Become  
Ongoing Clients

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# Adam Chapman

Developing An Unconventional Thank-You Note  
Strategy To Generate More Referrals From COIs

## Session Notes



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# Libby Greiwe

Running Client-Hosted Referral Events To  
Authentically Attract New Long-Term Relationships

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# Tiffany Charles

Implementing A 3-Meeting Relationship-Building Process With New COIs To Start A Steady Stream Of COI Referrals

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