

# GROWING YOUR \$800,000+ PRACTICE



SETH  
STREETER



JARROD  
MUSICK



slido

#Grow2

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# 3-STEP SUCCESS LEVEL SET


1. Always start with a vision: where is it you would like to go?
2. Create a culture that attracts, retains & empowers
3. You have to become less superstar dependent.
  - Systematize all aspects of the practice
  - Defined org chart w/ team structure
    - Diamond team
    - Clear career ladders & comp
    - Mentoring programs (peer led training)

NOW IT'S TIME TO...

GET OUT OF YOUR OWN WAY  
AND GROW



# 1: SYSTEMATIZE GROWTH CHANNELS

MISSION  WEALTH<sup>SM</sup>  
Your goals. Our mission.

**BIDEN, JOSEPH AND JILL**  
**2022 TAX LETTER**

The following is a list of some of the financial planning activities that have been completed for our client. We hope this letter assists you in preparing the tax return. Please let us know if you have any questions.

**TAX DOCUMENTS**  
We know of the following income sources and accounts, for which we expect a corresponding tax document.

Account Description	Expected Tax Document
Joe Biden's Living Revocable Trust	1099 Consolidated
Jill Biden's Taxable Brokerage Account	1099 Consolidated

**CONTRIBUTIONS TO TRADITIONAL/ROTH IRAS**  
Contributions were made to Traditional IRAs and/or Roth IRAs.  
We are aware of the following contributions:

Description	Amount
Traditional IRA Contribution - Joe Biden	\$7,000.00
Roth IRA Contribution - Jill Biden	\$7,000.00

**CHARITABLE DISTRIBUTIONS FROM IRAS**  
Distributions were made from IRAs directly to charitable organizations.  
We are aware of the following donations made directly from IRAs:

Description	Amount
Qualified Charitable Distribution - Jill Biden	\$75,000.00

## 1. ORGANIC

- Client referrals systematize the process (Goldmine vs landmine clients)
  - CRM initiated deliverables (share client success stories, communicate your capacity and passion for serving similar clients)
  - Life-planning advantage
  - Timing matters – sequenced outreach & agenda time

## 2. COIS

- Expand your definition of a COI (fitness trainers, life coaches, real estate agents, therapists)
- Incorporate touchpoints into your service deliverables & leverage software
  - Holistiplan: communication to CPAs (scale)
  - Process checkpoints: single email, phone call, repeatable
  - Share success stories & collaborate on best opportunities
  - Highlight shared client profiles you both serve, inquire & listen to client process & weave in your touchpoints

# IDENTIFY KEYWORDS FOR PROFESSIONAL SPECIALIZATIONS & AFFINITY INTERESTS



DESTINYCAPITAL

Center of Influence/Professional Partners

Name

Last updated on 7/31/17

GOAL: Discover information that will deepen our relationship with COI and create strong reciprocity

COI Profile	COI Goals/Challenges	Need to Know
<ul style="list-style-type: none"> <li>Name</li> <li>Age</li> <li>Hometown:</li> <li>College:</li> <li>Family:</li> <li>Company Name</li> <li>Size: Partners?</li> <li>Services offered:</li> <li>Target Clients</li> <li>Fees</li> <li>Growth Oriented</li> <li>SWP Client: Y or N</li> </ul>	<ul style="list-style-type: none"> <li>Personal Goals:</li> <li>Professional Goals:</li> <li>Personal Challenges:</li> <li>Professional Challenges:</li> </ul>	<ul style="list-style-type: none"> <li>Communication Preference</li> <li></li> </ul>
Interests/Entertainment	Client Introductions	Professional Relationships
<ul style="list-style-type: none"> <li>Hobbies</li> <li>Travels               <ul style="list-style-type: none"> <li>o 2017: Hawaii, Italy</li> </ul> </li> <li>Associations/Boards</li> <li>Entertainment</li> <li>Exercise</li> <li>Wedding Anniversary Date</li> </ul>	<ul style="list-style-type: none"> <li>2017:       = 5</li> <li>2018:</li> </ul>	<ul style="list-style-type: none"> <li>Important people they work with.</li> <li>Other connectors</li> </ul>



MISSION WEALTH

## YOUR PARTNER IN BUSINESS

Dear Helena,

As wealth advisors, not only do we value our client relationships, but we also enjoy working closely with our clients' other trusted advisors. Our holistic wealth management approach incorporates investment-related tax planning, including tax minimization strategies, tax projections, tax loss harvesting, Roth conversions, and charitable donation planning. Together with you, we can help our clients make smart financial choices that positively impact their tax situation.

An example of this is the custom tax preparation letters that we provide to our Private Clients\* and their accountants. These letters contain valuable, pertinent information that will save both them and you time when it comes to filing their tax returns. This letter captures many of the investment-related financial transactions that impact our clients' tax returns throughout the year. It also summarizes the relevant information for you in a concise, easy-to-read format. These financial transactions may include the following:

- Charitable Distributions from IRAs
- Roth IRA Conversions
- Inherited Cost Basis
- Donor-Advised Fund Contributions
- Net Unrealized Appreciation (NUA)
- Contributions to Traditional and/or Roth IRAs
- Interest on Intra-Family Loans
- 60-Day Rollovers
- Long-Term Care Insurance Premiums
- Advisory Fees Paid from Corporate Accounts
- Personal Gifts above the Annual Exclusion Amount
- Precious Metals Taxed as Collectibles
- Accrued Interest on Bonds
- HSA Contributions
- 529 Plan Contributions
- Resident Municipal Bond Interest

Each financial transaction detail includes the date, applicable tax year for the financial transaction, a description, and an amount when applicable.

At Mission Wealth, we are committed to delivering a best-in-class client experience. When a client's entire tax picture is transparent and aligned, we can help our shared clients to avoid costly missteps. Would you like to learn more? Please reach out to me with any questions you may have, or view our one sheet for [tax professional partners](#).

Regards,

Shane Holt, CFP®  
Client Advisor  
**MISSION WEALTH**  
[shot@missionwealth.com](mailto:shot@missionwealth.com)  
(805) 690-3879

\*Our Private Client solution is designed for individuals with \$5 million or more in assets under management.

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Our mailing address is:  
1111 Chapala St., 3rd Floor  
Santa Barbara, CA 93101

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MISSION WEALTH

## YOUR PARTNER IN BUSINESS

As a trusted, professional advisor, Mission Wealth treats your clients with the utmost care to deliver the highest value service possible.

For 20 years, we have abided by the golden rule: "Treat others the way you want to be treated". As fiduciaries, advisors and clients, we must have their best interests in mind. We collaborate with you, their professional advisor, in helping our shared clients to achieve their goals.



### AS PART OF OUR PROMISE TO YOU, WE WILL:

- Collaborate throughout the process
- Proactively communicate
- Help facilitate joint client meetings
- Deliver peace of mind to both of our shared clients

### WE HAVE EXPERIENCE HELPING CLIENTS THROUGH LIFE AND TRANSITIONS, INCLUDING:

- Sale of a business or property
- Divorce
- Retirement
- Loss of a spouse
- Inheritance
- Health event

2021  
**BARRON'S**  
TOP 100 RIA FIRMS

[missionwealth.com](http://missionwealth.com) | 888.642.7221

## Your goals. Our mission.

Over  
**\$4.8B**

Billion  
Assets Under  
Management

Over  
**2,100**

Client Advisory  
Relationships

**24**

Offices  
Located Across  
the U.S.

**100%**

Employee-Owned  
and Operated

**83**

Employees and  
Growing

### RECENT CLIENT SUCCESS STORY

A divorce attorney referred a female client to a Mission Wealth advisor to **create a spending and cash flow analysis**.

- The attorney and her client wanted guidance on how to predict and budget the client's spending in the wake of her divorce settlement.
- The advisor worked with the client to compile her spending figures from bank accounts and credit cards to project future cash flow needs.
- The client owned \$100M in a concentrated stock holding with a software company.
- We worked closely with the client's CPA to devise a strategy to diversify the client's investment portfolio, manage taxes, and create an income stream to meet the client's cash flow needs.
- Working with the client's attorney, we set up and funded a Charitable Remainder Trust with \$5M of the concentrated stock holding, further reducing capital gains taxes and providing her an income tax deduction.
- Our collaborative partnership with the client and her trusted advisors resulted in the best solution for the client as she navigated the uncertainty of her divorce.

Success Story



\*QUICK FACTS DATA AS OF 7/29/22. FULL AWARD DISCLOSURES CAN BE FOUND AT [HTTPS://MISSIONWEALTH.COM/AWARDS-AND-RANKINGS/](https://missionwealth.com/awards-and-rankings/). MISSION WEALTH IS A REGISTERED INVESTMENT ADVISER. 00435131 7/22

Affirm  
Relationship

IMPORTANT: Follow up with a

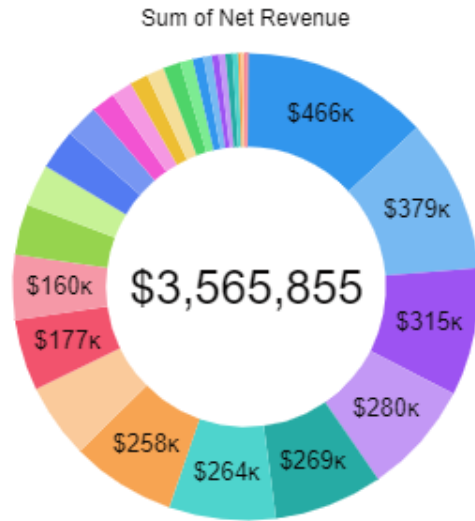
CALL TO ACTION!



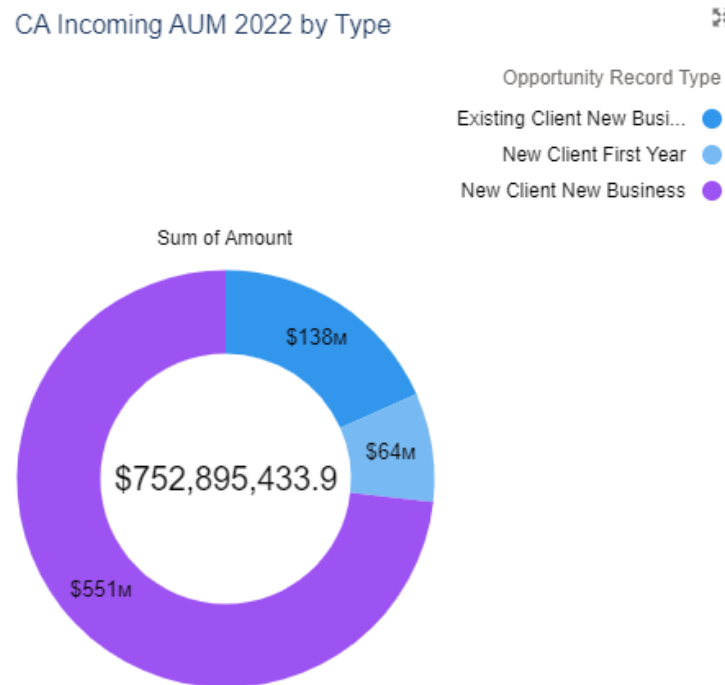
# GROWTH DASHBOARD

What you don't measure, you don't know

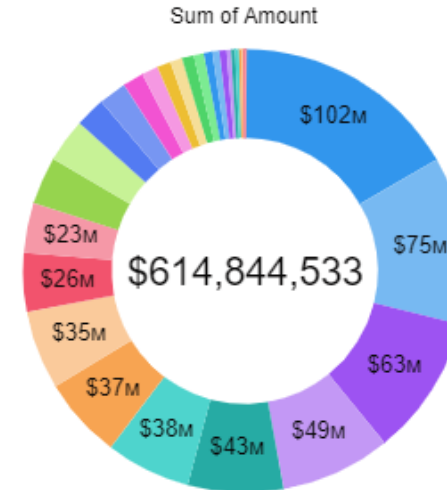
LA Incoming Revenue by Lead Advisor 2022



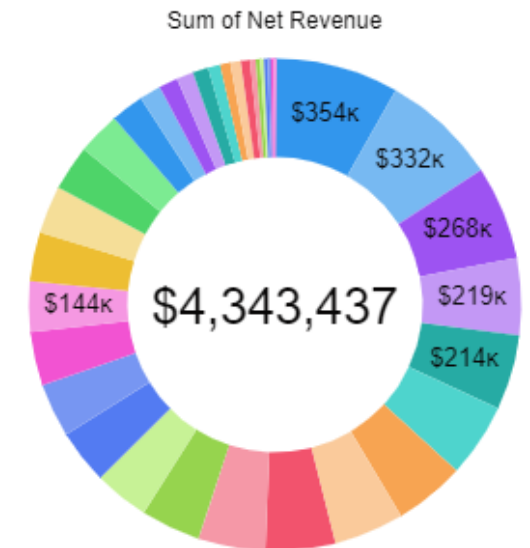
CA Incoming AUM 2022 by Type



LA Incoming AUM by Lead Advisor 2022



CA Incoming Production 2022



*Come to the Managing Growth w/ Teams roundtable!*

# 2: CREATE DIGITAL MARKETING PLAN

- Create space and schedule time for content factory
  - Schedule (process, calendar, etc.)
  - Use your content calendar & select distribution
  - Leverage technology
  - Invest in your marketing team capacity
  - You need at least 1 outsourced, dedicated marketing resource
- Build Your Marketing Team
  - Build Your Community
  - Create Your Ideal Profile
  - Drive engagement
  - Tie into your business development channel

## Annual Content Calendar

INSTRUCTIONS: Update and customize this calendar to organize your communications and content. An example of content has been provided for the month of January. As you build your own, be sure to customize the audience to align with your communication groups. This may include specific centers of influence (CPA, attorneys, etc.), only top clients or groups of clients who share interests / demographics.



LIMITLESS

MONTH	Content Type	Goal Date	Status	Clients	COIs	Prospects / Mailing List	Notes
January							
Happy New Years Cards	Mailed	12/27/2019	Sent	x	x		Custom cards designed with fun quotes from each team member, signed by team.
Retirement Resolutions Count Down	Social Media	1/3/2020	Sent	x		x	
Bring on the New Year (Client appreciation)	Newsletter	1/5/2020	Drafted	x	x	x	Thank you letter to clients, share what's ahead for new year, 5 tips for retirement resolutions.
"How Not to Run Out of Money in Retirement"	Social Media	1/10/2020	Drafting	x	x	x	Caption from recent speaking event held
Retirement Planning in your 50s	Blog post	1/20/2020	Pending	x	x	x	Share Elizabeth's story, post to social media & website
Retirement Planning in Your 50s	Social Media	1/27/2020	Pending				Short version of blog post
February							
March							
April							
May							

LIMITLESS

# 3: MARKET AS A FIRM

1. Establish marketing strategy (intentional but personalized)
2. Create a collective, cohesive voice
  - Keep voice of founder still forefront (reiterate value prop of team)
  - Define your style – words & tone we use
  - Show your humanity
  - Gain far better results!



Embrace the Seasons and Cycles of Your Life

By **Seth Streeter, MS, CFP®, CDFA™**  
Chief Impact Officer and Founder

"Embrace the seasons and cycles of your life. There is magic in change." - Bronnie Ware

"Aging is an extraordinary process where you become the person you always should have been." - David Bowie

Summer has officially arrived. Students are enjoying time out of school, families are taking long-anticipated vacations, and hot weather has descended upon us.

For many of us, our expectations for each season become familiar. We look forward to the unique activities, sights, and aromas that each season affords. Summers may be for gardening, picnics, flowers, or beach visits. The fall may bring the return of the school

Two of my favorite questions are, "What advice would you give to your younger self?" and, "What advice would your older self give you today?" The answers to these questions can help illuminate the things in our lives that truly matter most. Here is to us heeding this self-counsel as we plan our years ahead! Please share these insights with your Mission Wealth advisors so we can help empower your dreams into reality.

*Seth Streeter*



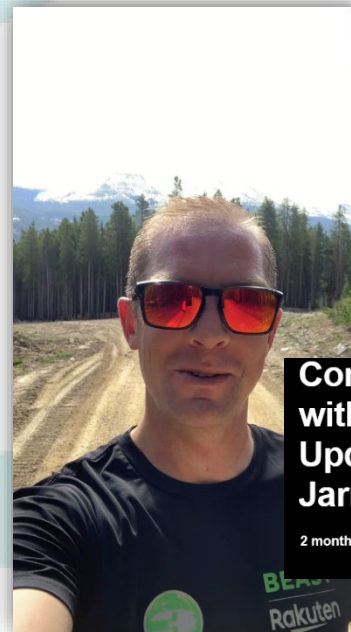
Firm Announcements

Central Coast Business Times Best Places to Work 2022

We are excited to be named one of the top 50 Central Coast Best Places to Work for 2022. The Pacific Coast Business Times, the weekly business journal for Ventura, Santa Barbara, and San Luis Obispo Counties, presents this award annually. Please read our full write up on this award on our website.



"When I look around the firm, I am proud to be associated with each and every person," said Founder and Chief Strategy Officer **Brad Stark**. "Trust, caring, mutual respect, high moral character, smarts are not even a question but just a given. Each person knows without a doubt that everyone is working together as a team for a collective good. It's a wonderful and special environment. But it only happens because of who the people are in their hearts and minds. We are fortunate to have attracted more than our



Connect Money with Meaning - Update From CEO Jarrod Musick

2 months ago



Take The Time & Make It Count - Update From CEO Jarrod Musick

1 month ago



Seth Streater • 1st

Founder & Chief Impact Officer | Mission Wealth

2mo • 🌐

I hope all my fellow Dad's felt the love and appreciation yesterday. In honor of Father's Day this past weekend, I shared a brief insight I shared with my kids in 4th grade to help improve their relationship with money. I gave them each three jars with different labels. One was a "spend jar" – money they can use for whatever they wanted. The second was a "save jar" – money for bigger things they wanted to save for in the future. The third jar was a "give jar" – to help those less fortunate than us.

It was fun to see where my kids would put the money into over time, and I saw that it gave them an awareness and understanding of instant gratification versus saving or giving. I also spoke to both of my kid's classrooms, and they started their own "give jars." At the end of the year, the kids got to choose which organization they wanted to support. It was nice to see them connect the dots between their giving jars and the impact they were able to make by saving money.

This story may help spark some ideas for you to use with your own kids about saving and giving money. It is never too late to teach your kids good money habits.

[#moneytips](#) [#fathersday2022](#) [#fathersday](#) [#financetips](#) [#quotes](#)  
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"How did you teach your kids about saving and spending money?"



Seth Streater, Co-Founder and Chief Impact Officer



# How We Speak to Our Audience

	What We Say	What We Don't Say	Why?
<b>Empowering</b>	It's normal to feel stuck, we can help align your priorities on your journey to fulfillment	A successful entrepreneur never runs out of reasons to feel fulfilled	We don't want to come off as demeaning or aggressive. Instead, help them see the reward ahead
<b>Understanding</b>	Success is subjective, and we understand that	Your success is based on your money and accolades	We understand the uniqueness to each story and our client's idea of fulfillment
<b>Visionary</b>	We are completely unique from the traditional wealth management structure	We are a one-size-fits-all wealth management team	We believe in managing the past to help their situation
<b>Secure</b>	We are experts on the entrepreneur journey and mindset	We are experts on being an entrepreneur	We want to help our clients' expertise

**Keywords**

USE

Align/ment	Elevate	Simplicity	(Core) Values	Agency	Impact/ful
Collaborative	Empathy	Challenge	Vision	Abundance	Foster
Organized	Roadmap	Design	Present	Profound	Advocate
Priority	Mission	Integrity	Intent/jonal	Clarity	Journey
Trusted Partnership	(Operating) Business Owners	Emotionally Important	Value First/Focused	(Irreplaceable) Relationship	Mindset
Expertise	Adaptive	Meaning/ful	Complementary	Answers	Confident
Focused	Empathy	Discovery	Respect	Connection	Knowledge/able
Comfort	Empower/ed	(Personal) Growth	Tailored	Dedicated	Success
Proactive	Guidance	Evolving	Purpose	Passion/ate	Opportunity
Specialized	Sudden Wealth	Inspire	Gratitude	Craft	

AVOID

Power/ful	Independent	Experienced	Personalized	Disciplined	Comprehensive
Honest	Holistic	Researched	Solutions	Guarantee	Promise
Sudden Money					

GROWTH IS NOT A SOLO SPORT





LIMITLESS Q&A