

Your Unique VALUE PROPOSITION



ADAM
CMEJLA



slido
#Grow2

There are 263,000 Financial Advisers in the USA.

How do we stand
out in the crowd and
make ourselves

unique?



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NOT a differentiator:

- Knowledgeable, caring, experienced
- Always here for my clients
- Comprehensive financial planning
- Fiduciary partner
- Fee only

Every bank looks exactly
the same.

Longevity and consistency
makes us feel safe.

But this is not the future...



Match your brand,
not the advisor next door.

ASK YOURSELF...

1. Everybody else does this, and I don't because...?
2. I don't do this and everyone else does, because...?



We help optometric practice owners nationwide proactively manage cash flow, reduce taxes, and invest prudently so they can plan life, on purpose.

VALUE MESSAGING WORKSHEET

Complete this worksheet to help you clarify, define and package your brand messaging points into a clear, concise and compelling prospect story.

IDEAL CLIENTS
Who are your ideal clients? List the top 5-10 characteristics of the clients your message intends to attract.

1. _____	6. _____
2. _____	7. _____
3. _____	8. _____
4. _____	9. _____
5. _____	10. _____

FROM HERE | BEFORE STATE

SOLUTIONS & BENEFITS

TO HERE | AFTER STATE

<p>WHAT I DO What I Do & The Value I Add</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>What is the work you do? And what create with your work?</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>THE VALUE OFFER Describe the 3 key (client-centric) outcomes you help create. Include 2-3 points that support these points in more detail.</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>Key Outcome #1: _____</p> <p>Supporting Points</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p>
<p>3 KEYS Define the 3 messaging points that best support your role, approach you take and process you follow for delivering value.</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>Define key points regarding the ROLE you play as their Financial Advisor</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p>

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PUTTING IT ALL TOGETHER

Use this outline to help you put the key points of your brand messaging into a story script to help guide your conversations.

THE SIMPLE STORY MESSAGE
Turn your key points into simple, value-based explanation of what you do, the value you add, who you do it for and, ultimately, the fees that you charge.

NOW TURN THE ABOVE LANGUAGE INTO A SIMPLE, SUCCINCT, STRAIGHT-FORWARD SENTENCE:

I help _____ to _____ so that they can _____ and _____.

WHAT I DO	
THE VALUE OFFER	
3 KEYS	

HOW I CHARGE
My fees for (financial planning) are...

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Let's go
BEHIND THE
SCENES...

SHOWDOWN

INTRO CALL:

"During our next meeting, I want to specifically learn about what you hope to accomplish in retirement. We will discuss specific activities, timelines, desired income levels, and legacy goals. Learning about these goals will allow me to craft a plan using my specific expertise to create flexible income from your assets while not overpaying income taxes."

24 HOUR APPT REMINDER:

"During our call, we will discuss any questions you have about your retirement plan and how my team & I might best be able to help by creating a flexible retirement income plan and making sure you aren't overpaying your income taxes."

PLAN PRESENTATION

"How do I make decisions with the cash flow in the business?"

ADAM'S 3 POINTS:

1. Reinvest back in the business
2. Build wealth through the business
3. Solve for joy

Financial Review Spreadsheet

Gross Revenue	\$ 1,000,000
COGS (i.e. Direct Expenses)	\$ 250,000
Gross Profit (Revenue - COGS)	\$ 750,000
Net Income	\$ 100,000
Total Expenses	\$ 500,000
Cash on Hand	\$ 150,000
Owner's Wage Income	\$ -
Doctor's Wage Income (non-owner)	\$ 250,000
Staff Wages	\$ 75,000
Rent/Building Expense	No
Does client own building?	No
COGS as a Percentage of Gross Revenue	
Profit Margin	\$ -
Profit Margin at 15%	\$ -
Profit Margin at 20%	\$ -
Profit Margin at 25%	\$ -
Labor Productivity	
Total Payroll	
Total Owners Compensation	
Total's Owners Compensation %	
Rental/Building Expense % of Gross Revenue	

2	Have you determined a sales price?	
3	Purchase Year	
4	Business Value (per seller)	
5	Percentage of Purchase	
6	Cost of Purchase (What percentage of the business is being purchased?)	
7	Multiple Used	
8	As a Multiple of Revenue	
9	Top Line Revenue (Total Income)	\$ 420,000
10	Cost of Goods Sold (COGS)	\$ 100,000
11	Gross Profit (Total Income minus COGS)	\$ 320,000
12	Total Operating Expenses	\$ 1.6
13	Net Income	\$ 0.42
14	Adjustments (see below)	\$ 1,000,000
15	Total Interest Expense, Depreciation & Amortization	\$ 157,598
16	Adjusted EBITDA (Earnings before Interest, Taxes, Depreciation and Amortization)	\$ 842,402
17	Margin % (Total Revenue Divided By Adjusted EBITDA)	\$ 591,160
18	Sale Multiple based on Adjusted EBITDA	\$ 251,242
19	Valuation Based on EBITDA	\$ -
20	Cash For Distributions	\$ 251,242
21	Revenue Per Year	\$ 25.12%
22	Loan Payback	\$ 4.5
		\$ 1,130,500

LIMITLESS



LEARN MORE

- Building a Story Brand, D. Miller
- Brand Identity Breakthrough: How to Craft Your Company's Unique Story to Make Your Products Irresistible, Gregory Dahl
- Made to Stick, Chip & Dan Heath
- Storyselling for Financial Advisors, Scott West & Mitch Anthony



ADAPT & APPLY

- Use your Value Messaging worksheet to draft and refine your unique value proposition (UVP)
- Watch Mapping Your Marketing Plan to insert your UVP into your messaging



TAKE ACTION

- Say your UVP out loud to yourself 30x so you know it as well as you know your phone number
- Determine where to insert your UVP statement into your marketing
- Talk with your website designer about where and how to incorporate your UVP into your online messaging

