

HIGH-NET WORTH Prospecting



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Marketing Efficiency Results By Strategy

Strategy	Efficiency			Agg. Avg. Rev/Client
	25th	50th	75th	
Client Referrals	1.7	4.7	18.8	\$ 8,953
SEO	0.0	3.4	6.8	\$ 1,192
COIs	0.8	3.0	7.8	\$ 15,737
Marketing Lists	0.0	2.8	7.2	\$ 4,615
Paid Web Listing	0.4	1.5	8.3	\$ 5,491
Online Ads	0.0	1.4	4.4	\$ 2,774
Seminars	0.4	1.3	2.0	\$ 2,702
Radio	0.0	1.2	2.5	\$ 4,378
Education Events	0.0	1.2	3.6	\$ 5,399
Solicitors	0.5	1.2	2.9	\$ 2,850
Paid Advertising	0.5	1.0	1.4	\$ 1,565
Podcasts	0.0	0.7	0.8	\$ 2,223
Networking	0.2	0.6	2.5	\$ 3,286
Website	0.0	0.4	2.6	\$ 2,100
Book	0.0	0.4	10.0	\$ 409
Client Appreciation	0.0	0.4	1.9	\$ 9,871
Direct Mail	0.0	0.2	9.1	\$ 2,012
Videos	0.0	0.1	0.2	\$ 2,594
Webinars	0.0	0.1	2.1	\$ 2,593
Firm Brochure	0.0	0.0	0.5	\$ 6,887
Social Media	0.0	0.0	0.8	\$ 1,713
Blogging	0.0	0.0	0.5	\$ 1,050
Drip Marketing	0.0	0.0	1.2	\$ 2,627
Marketing Consultant	0.0	0.0	0.3	\$ 5,235

LIMITLESS

1. PASSION PROSPECTING

Are you wondering:

1. Who are you?
2. How do you get exposure?
3. How do you nurture it?

2. TRADITIONAL COIS



Watch the Cultivating COIs lesson with Stephanie & Tiffany on the member site!

LIMITLESS

ENTREPRENEURSHIP

INVESTMENT
GROUPS

MINDFULNESS

COMMUNITY
ORGANIZING

TRAVEL

LIMITLESS

BRILLIANCE

FAMILY
EVENTS

WOMEN
CAUSES





"KNOW THYSELF"

Finish this preliminary step in your workbook

Getting Clients Doing What You Love

Use the below worksheet to start gathering ideas and implementing actions that you can use to improve your personal networking and gain clients doing what you love.

What do I love (hobbies, interests, causes, etc.)?

What do my ideal clients enjoy doing? (Where do they go? What do they do?)

Where is the overlap between my ideal clients and me?

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Getting Clients Doing What You Love

WHAT ACTIONS AND ACTIVITIES WILL YOU TAKE TO IMPLEMENT YOUR IDEAS?

Today?

Tomorrow?

Next Week?

Next Month?

Next Quarter?

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LIFE EVENTS FOCUS

Size & scale
creates focus
areas as
opposed to
one niche.

- 1 Business owners
- 2 Independent women
- 3 Retirees
- 4 Professionals
- 5 Socially responsible (ESG) investing
- 6 Life-centered planning (holistic wealth)

MARKETING, RESOURCES & EVENTS
FOR EACH OF THESE

THE HIGH-NET WORTH Passion Prospecting Process

must be organic and authentic

1

Connect authentically.
Be a capable contributor.

Nurture
the next
step

2

Be
validated.

Nurture
the next
step

3

Follow through
to cultivate
connection.

Nurture
the next
step

4

Invite &
show up.

Nurture
the next
step

5

Fact find
conversationally
& plant seeds.



STEP 1: Connect Authentically.



Mindfulness > Brilliance Group

Entrepreneurship > True Space

Non-Profit > DSST Foundation Board

Family Events > Contributor to Team Sports

Look For
Synergistic,
Integrative
Opportunities

SHARE VIA CHAT



BE A CAPABLE CONTRIBUTOR





STEP 2: Be Validated.

Be able to pass discovery through LinkedIn, website, Google and posted articles to keep the door open.

Don't be vanilla;
tell *your* story!

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STEP 3:

Follow through to
cultivate connection.

The more you give, the more
you receive.

Personalized, follow-up
communications.

Have fun!

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STEP 4: Invite & Show Up.

Share any events that may resonate.

Show up to events that they are part of.

Shared passion is contagious!

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STEP 5:

Fact Find Conversationally.

Find natural opportunities to plant seeds.

- "My day? Well..."
- "Guess I'll stick to my day job of..."
- "What's your game plan when..."
- "Today, I helped my client overcome their fear about..."
- "Have you heard about..."

FAILURE FORMULA



SUCCESS FORMULA





WATCH & READ

- Use 'Passion Prospecting' to Boost Your Business, and Yourself, Holly Batchelder
- Seth Streater on His Evolution From Managing Money to Redefining Wealth for Himself, Clients, and Staff, Steve Sanduski
- The Untethered Life: Wealth Redefined, Seth Streater, TEDx Santa Barbara
- No Stress Prospect Process Lesson
- Cultivating COIs Lesson



APPLY

- Get clear about your passions, hobbies and causes through the "Getting Clients Doing What You Love" exercise.



ACT

- Connect authentically through channels you are passionate about.
- Make sure you are able to be validated favorably by prospects through social media/Google.
- Follow through and show up, practicing conversational fact finding.



LIMITLESS Q&A