

Telling your
story defines the
value you deliver
to clients.



L I M I T L E S S

Your messaging needs to express the value you offer to your clients, along with why and how you are positioned to deliver that value. Your messaging should cover:

- Whom you serve, your target client profile
- What you offer, including benefits, experience, outcome, emotional state, etc.
- What specific problems you solve
- Your approach to solving them
- The before and after state of working with you
- Why you, rather than any other advisor
- Proof points, demonstrate proof of concept

All of these ideas need to be expressed quickly and succinctly in a few sentences that you can share in a clear, concise and confident way.

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

FROM HERE I BEFORE STATE

SOLUTIONS & BENEFITS

TO HERE I AFTER STATE

WHAT I DO

What I Do & The Value I Add

What is the work you do? And what is the main impact, outcome and/or experience you help to create with your work?

THE VALUE OFFER

Describe the 3 key (client-centric) outcomes you help create. Include 2-3 points that support these points in more detail.

Key Outcome #1:

Supporting Points

1. _____

2. _____

3. _____

Key Outcome #2:

Supporting Points

1. _____

2. _____

3. _____

Key Outcome #3:

Supporting Points

1. _____

2. _____

3. _____

3 KEYS

Define the 3 messaging points that best support your role, approach you take and process you follow for delivering value.

Define key points regarding the **ROLE** you play as their Financial Advisor

1. _____

2. _____

3. _____

Define key points regarding the **APPROACH** you play as their Financial Advisor

1. _____

2. _____

3. _____

Define key points regarding the **PROCESS** you play as their Financial Advisor

1. _____

2. _____

3. _____



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...

