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# **BUILDING YOUR MARKETING FUNNEL**

**Limitless Retreat 2022  
Nashville, TN**

Prospecting Stats (Running Total)	
Active	4
Inactive	138
CLIENT	25
Conversion Rate	61.0%
Assets Xferd	\$56,150,000
Assets in Pipeline	\$7,300,000

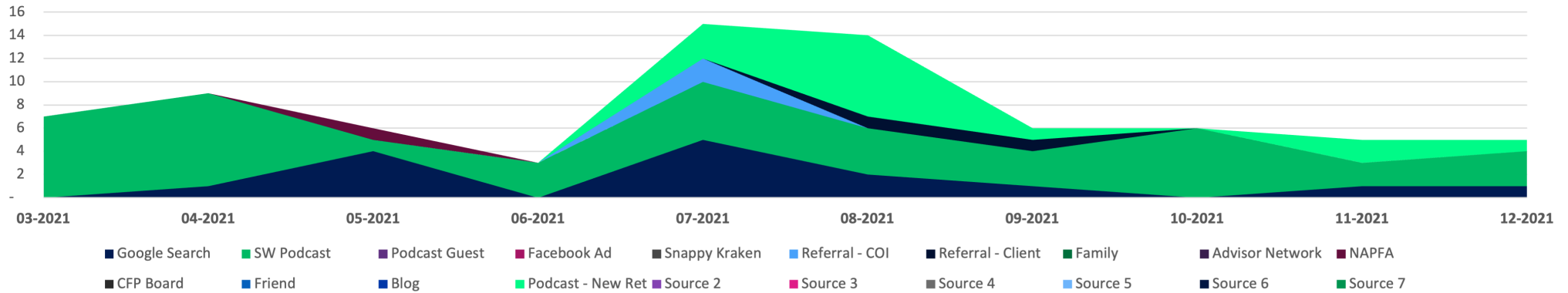
# PROSPECT LOG

[Click Here for Prospect Tracker Video Tutorial](#)

No.	Last	First	Source	Investable Assets	AUM Fee (%)	AUM Fee (\$)	Flat Fee	Status	Days In Process	Intro Call	1st Meeting	2nd Meeting	Onboarded	Yes/No
1	Smith	Harold	SW Podcast	\$ 1,300,000				INACTIVE	-	2/17/20				
2	Smith	Eily	Google Search	\$ 1,000,000				INACTIVE	-	1/13/21				
3	Smith	Scott	SW Podcast					INACTIVE	-	10/11/21				
4	Smith	Judy	SW Podcast	\$ 1,300,000	0.80%	\$ 10,400		CLIENT	25	6/15/20	6/22/20	7/8/20	7/10/20	YES
5	Smith	Shah	Google Search	\$ 2,100,000				INACTIVE	-	10/26/20				
6	Smith	Noland	SW Podcast	\$ 2,000,000				INACTIVE	-	3/24/21				
7	Smith	John	SW Podcast					INACTIVE	-	10/20/21				
8	Smith	Mark & Janie	SW Podcast	\$ 9,000,000				INACTIVE	-	9/8/20				
9	Smith	Sandra						INACTIVE	-	10/21/21				
10	Smith	Michael	Google Search	\$ 3,000,000				INACTIVE	7	2/17/21	2/24/21			
11	Smith	Jay	Google Search	\$ 1,100,000				INACTIVE	-	9/1/21				
12	Smith	Doris	Referral - Client	\$ 1,100,000				INACTIVE	-	8/31/21				
13	Smith	Andy	Google Search	\$ 1,800,000	0.80%	\$ 14,400		CLIENT	138	4/15/21	7/7/21	8/24/21	8/31/21	YES
14	Smith	Magdi	Google Search	\$ 870,000				INACTIVE	-	1/13/21				
15	Smith	Kyle	SW Podcast	\$ 750,000				INACTIVE	-	4/6/20				
16	Smith	Paul	SW Podcast	\$ 6,500,000				INACTIVE	-	8/17/20				
17	Smith	Mark						INACTIVE	-	7/28/20				
18	Smith	John & Julie	Google Search	\$ 5,000,000				INACTIVE	30	9/29/20	10/7/20	10/29/20		NO

	2020 + 2021	2020	2021
Assets Transferred	\$ 56,150,000	\$ 19,500,000	\$ 36,650,000
Total Yes	25	12	13
Avg Yes Household	\$ 2,246,000	\$ 1,625,000	\$ 2,819,231
Total No	16	7	9
Avg No Household	\$ 2,471,875	\$ 2,642,857	\$ 2,338,889
Conversion Rate	61.0%	63.2%	59.1%
Avg Days in Process	68	78	59
Total Intro Calls	166	58	108
Prep (hrs)	0.5	0.5	0.5
Meeting (hrs)	0.5	0.5	0.5
Notes/Follow Up (hrs)	0.5	0.5	0.5
Total Intro Calls Hours	249.0	87.0	162.0
Total 1st Meetings	45	19	26
Prep (hrs)	3.0	3.0	3.0
Meeting (hrs)	2.0	2.0	2.0
Notes/Follow Up (hrs)	0.5	0.5	0.5
Total 1st Meetings Hours	247.5	104.5	143.0
Total 2nd Meetings	41	19	22
Prep (hrs)	9.1	8.0	10.0
Meeting (hrs)	2.0	2.0	2.0
Notes/Follow Up (hrs)	1.5	1.5	1.5
Total 2nd Meetings Hours	515.5	218.5	297.0
Total Hours	1,012.0	410.0	602.0
New Cash Flows (AUM)	\$ 405,200	\$ 185,700	\$ 219,500
New Cash Flows (One-Time)	\$ -	\$ -	\$ -
Total New Cash Flows	\$ 405,200	\$ 185,700	\$ 219,500

### Prospect Sources (Trailing 12 Months)



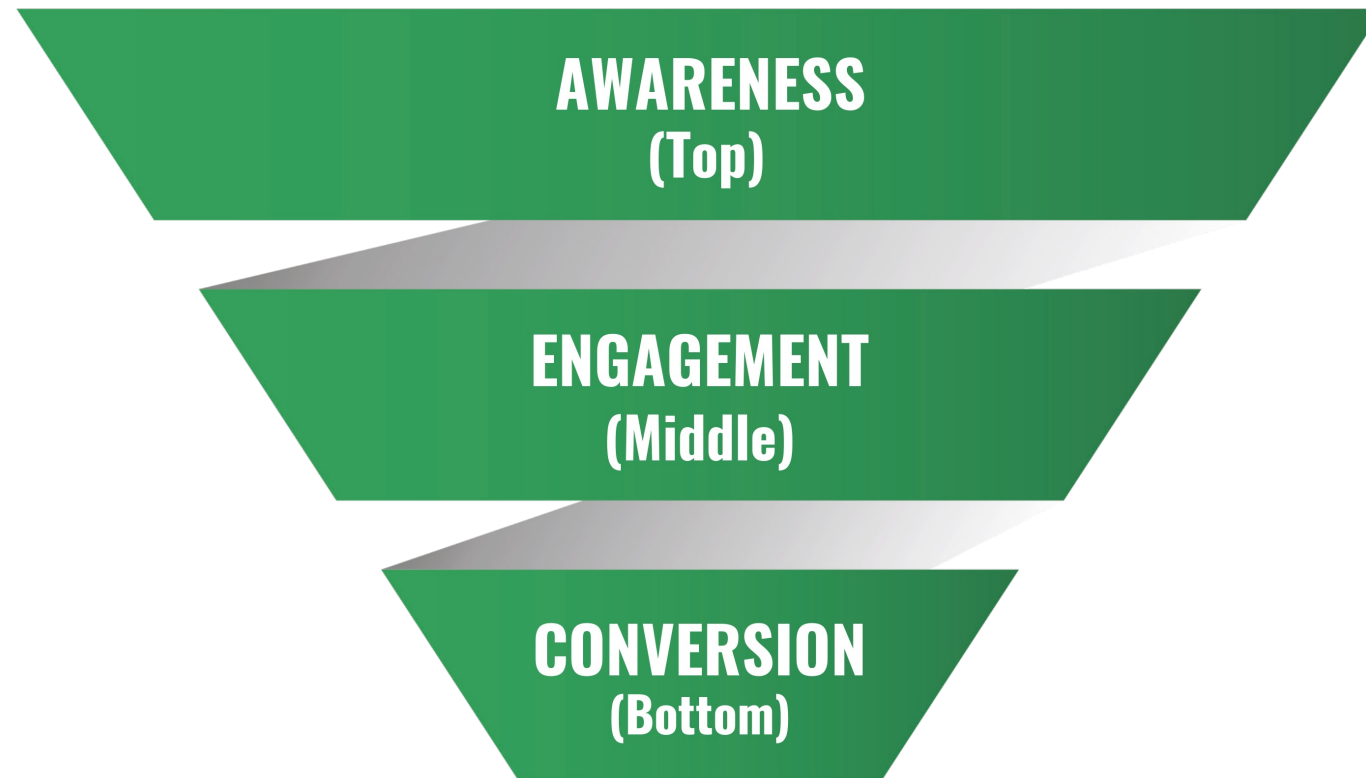
# 2020 & 2021 (24 MONTHS)

## **\$400k+ in (New) Recurring Annual Revenue:**

- **166** intro calls
- **41** qualified *potential* clients
- **25** new (recurring) clients
- **\$56MM** in new assets
- **61%** conversion rate

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# Strategy vs Tactics



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## MY GOAL:

- Help you develop one marketing funnel
- Once it's mastered and you've proven success, you can develop a second one.
- Or...*“Do one thing. If it works, do more of it. If it doesn't, do something else.” (Franklin D. Roosevelt)*

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# **Two Requirements:**

- 1. Clear Client Avatar**
- 2. Compelling CTAs**

# CLIENT AVATAR

## Demographics

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



## Pain Points

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# CLIENT AVATAR

## Demographics:

1. Age 50+
2. \$1MM+ investable assets
3. Low expenses, zero debt



 **DEFINE FINANCIAL**

## Pain Points:

1. Tsunami of RMDs
2. Surviving spouse lacks expertise
3. Time is limited/valuable

# CLEAR AVATAR

## Demographics:

- Profession (e.g., Optometrist, SLP, Dentist)
- Employer (e.g., Intel, Amazon, Qualcomm)
- Employment position (e.g., Senior Developer, C-Suite)
- Compensation type (e.g., W2, RSUs, Contractor)
- Marital/dependent status
- Age or generation (e.g., Millennials, Gen X/Y)
- Income
- Tax bill (e.g., paying \$300,000+ in taxes per year)
- Savings rate or amount (e.g., saving 70% of income, maxing out retirement accounts)
- Business owner (gross revenue, # of employees, Pre IPO)
- Geographic location

## Pain points:

- “Don’t know what we don’t know”
- Make work optional
- Organize and simplify finances
- Mitigating taxes while working
- Navigating/maximizing/understanding complex comp
- \$\$\$ stuck in business (how to sell to fund retirement)
- Career stagnant
- Starting a business
- Student loan debt
- Cash flow challenges
- Liquidity event, inheritance, death, divorce

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**AWARENESS**  
(Top)

**ENGAGEMENT**  
(Middle)

**CONVERSION**  
(Bottom)

## AWARENESS (Top)

- Where does your avatar live and consume info?
- What type of content are they consuming?
- Pain points and demographics can help!
  - (e.g., *SEO > Google search “IRMAA 2022 brackets” or “financial planner San Diego” or “how to invest \$10MM”*)

## **AWARENESS (Top)**

- SEO
- Paid Social Ads
- Cold Calling/Emailing/DM-ing
- Direct Mail
- Media Mentions
- Viral Campaign
- Tradeshow/Conference (e.g., Dental conference)
- On-campus (Illumina)



## ENGAGEMENT (Middle)

- What do you enjoy?
- What's authentic to you?
- How does your avatar prefer to engage?

\*\*\* Consistency is **CRITICAL!** \*\*\*

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## ENGAGEMENT (Middle)

- Podcast, blog, YouTube
- Email marketing campaign
- Webinars and workshops
- Public speaking or teaching classes
- Guest writing
- Guest interviews (podcasts, YouTube)
- COI marketing process
- SHAKING HANDS!

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## **CONVERSION (Bottom)**

- Free Consultation
- Free Analysis
- Intro Call/Meeting
- Presentation or Proposal
- Multi-Step Sales Process

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# EXAMPLE #1



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## EXAMPLE #2

Cold LinkedIn Direct Messages  
to Qualcomm Executives

Monthly Educational Webinar on  
Optimizing Qualcomm Benefits

The  
**ULTIMATE SALES PROCESS**  
for financial advisors

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## EXAMPLE #3

Facebook Ads to High Net Worth  
Retirement Savers Over Age 50

Free Medicare IRMAA E-Book



Email Newsletter

The  
**ULTIMATE SALES PROCESS**  
for financial advisors

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# Q&A