



# Marketing Funnel Template

A step-by-step guide to build  
an effective (and authentic!)  
funnel **that converts.**



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## MARKETING FUNNEL

# Activities



Acknowledging where a specific marketing activity fits within the funnel will allow you to set proper expectations and measure success. It will also allow you to identify gaps in your marketing efforts and ensure you have created

a clear, effective path for conversion. To help get you started, here are some examples of different activities at each stage of the marketing funnel. **Choose one activity from each stage to build your first marketing funnel.**

### AWARENESS

**What will you do to build trust, show your expertise, and keep your ideal client engaged?**

- Podcast
- Blog
- YouTube/Video
- Webinars/Workshops
- Public Speaking
- Teaching Classes
- Guest Writing
- Guest Interviews
- COI Nurturing Process
- Email Newsletter

### ENGAGEMENT

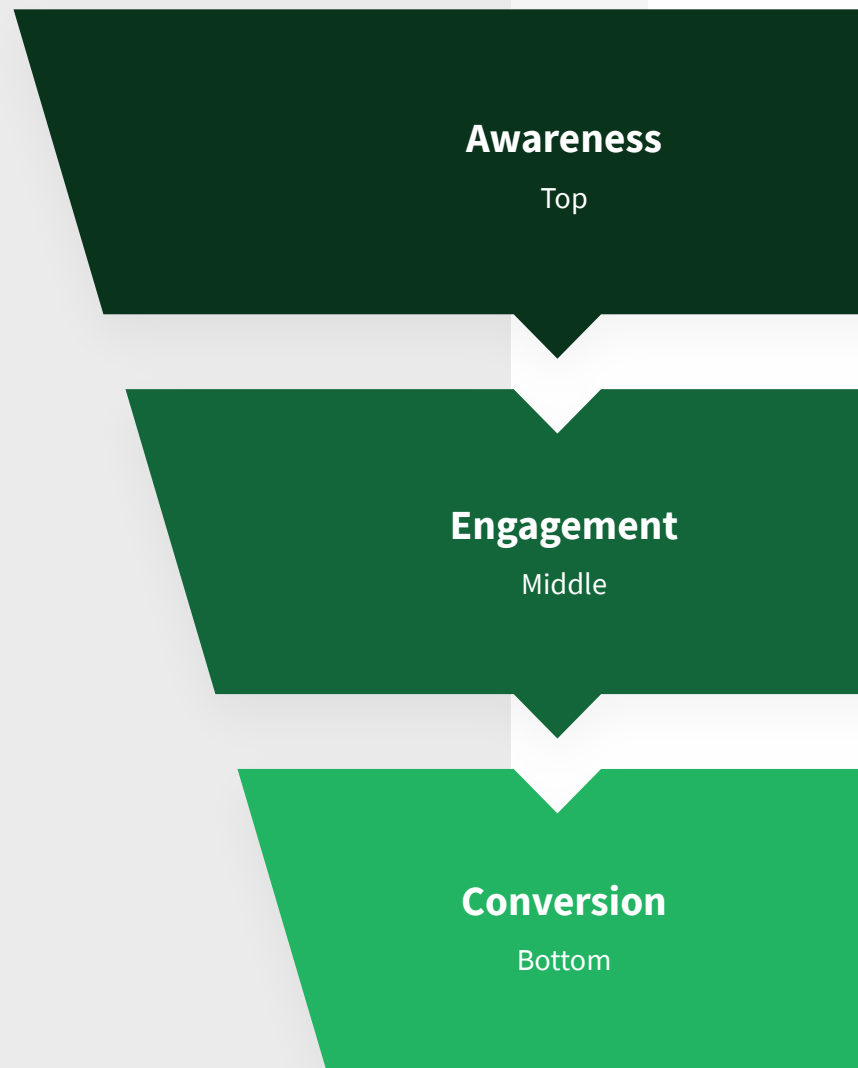
**What is your process for converting engaged prospects into lifetime clients?**

- Paid Advertising
- SEO
- Cold Outreach (email, DM, phone)
- Direct Mail
- Media Relations
- Viral Campaign
- Trade Show/Conference
- Online Directory
- In-person Networking
- Referrals

### CONVERSION

**Where does your ideal client first encounter you, your brand, your firm, your services?**

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



MARKETING FUNNEL

# Example #1



AWARENESS

1

**SEO**  
**(“Best Retirement Podcast”)**

ENGAGEMENT

2

**Weekly Podcast for High Net  
Worth Retirement Savers**

CONVERSION

3



# Example #2



AWARENESS

1

**Cold LinkedIn Direct Message to  
Qualcomm Executives**

ENGAGEMENT

2

**Monthly Educational Webinar on  
Optimizing Qualcomm Benefits**

CONVERSION

3



# Example #3



AWARENESS

1

**Facebook Ads to High Net Worth Retirement Savers Over Age 50**

ENGAGEMENT

2

**Free Medicare IRMAA E-Book**



**Email Newsletter**

CONVERSION

3



EXERCISES

# Your Marketing Funnel #1

① How Will You Create Awareness?

② How Will You Engage?

③ How Will You Convert?

AWARENESS

ENGAGEMENT

CONVERSION

1

2

3

EXERCISES

# Your Marketing Funnel #2

① How Will You Create Awareness?

② How Will You Engage?

③ How Will You Convert?

AWARENESS

1

ENGAGEMENT

2

CONVERSION

3

EXERCISES

# Your Marketing Funnel #3

① How Will You Create Awareness?

② How Will You Engage?

③ How Will You Convert?

AWARENESS

1

ENGAGEMENT

2

CONVERSION

3

# Need More Marketing Help?



**Taylor Schulte, CFP®**

In 2014, I launched Define Financial, a fee-only retirement planning firm headquartered in San Diego, CA.

Since starting my firm, I've been recognized as a Top 40 Advisor Under 40 by InvestmentNews and named the #2 Independent Financial Advisor by Investopedia (2022).

In addition to being a practicing financial planner, I'm also the:

- Co-Founder of **The AGC Advisor Community**
- Co-Host of the **Kitces Summits** w/ Michael Kitces
- Host of the **Experiments in Advisor Marketing** podcast

When I'm not nerding out on marketing, you can find me traveling with my family, searching for the next best carne asada burrito, or trying to master Adam Scott's golf swing.